



HEALTH AFFAIRS



Protected Health Information Management Tool (PHIMT)

HIPAA Training: Summer Sessions

TMA Privacy Office

*This document contains proprietary information and will be handled within Government regulations.
It is intended solely for the use and information of the Military Health System.*

Agenda

- Overview of PHIMT
- PHIMT User Interface
- User Admin Functionality
- Privacy Specialist/Regular User Functionality
- Administrative Summary

Training Objectives

- Once you have completed this course, you will be able to:
 - Describe the PHIMT application
 - Identify the user roles and permissions
 - Perform the functions of the User Admin, Privacy Specialist, and Regular User within the PHIMT

PHIMT Overview

Objectives

- Upon completion of this lesson, you will be familiar with the:
 - Commercial Off The Shelf (COTS) product customization
 - PHIMT Terminology
 - User roles and associated permissions
 - Hierarchy

Customized COTS Product

- COTS product built for HIPAA Privacy
- Browser-based
- Centrally administered
- Shared database
- Designed to perform fundamental tasks
 - Accounting of Disclosures
 - Record retrieval requirements
- Consolidation of multiple tasks into an electronic environment

Terminology

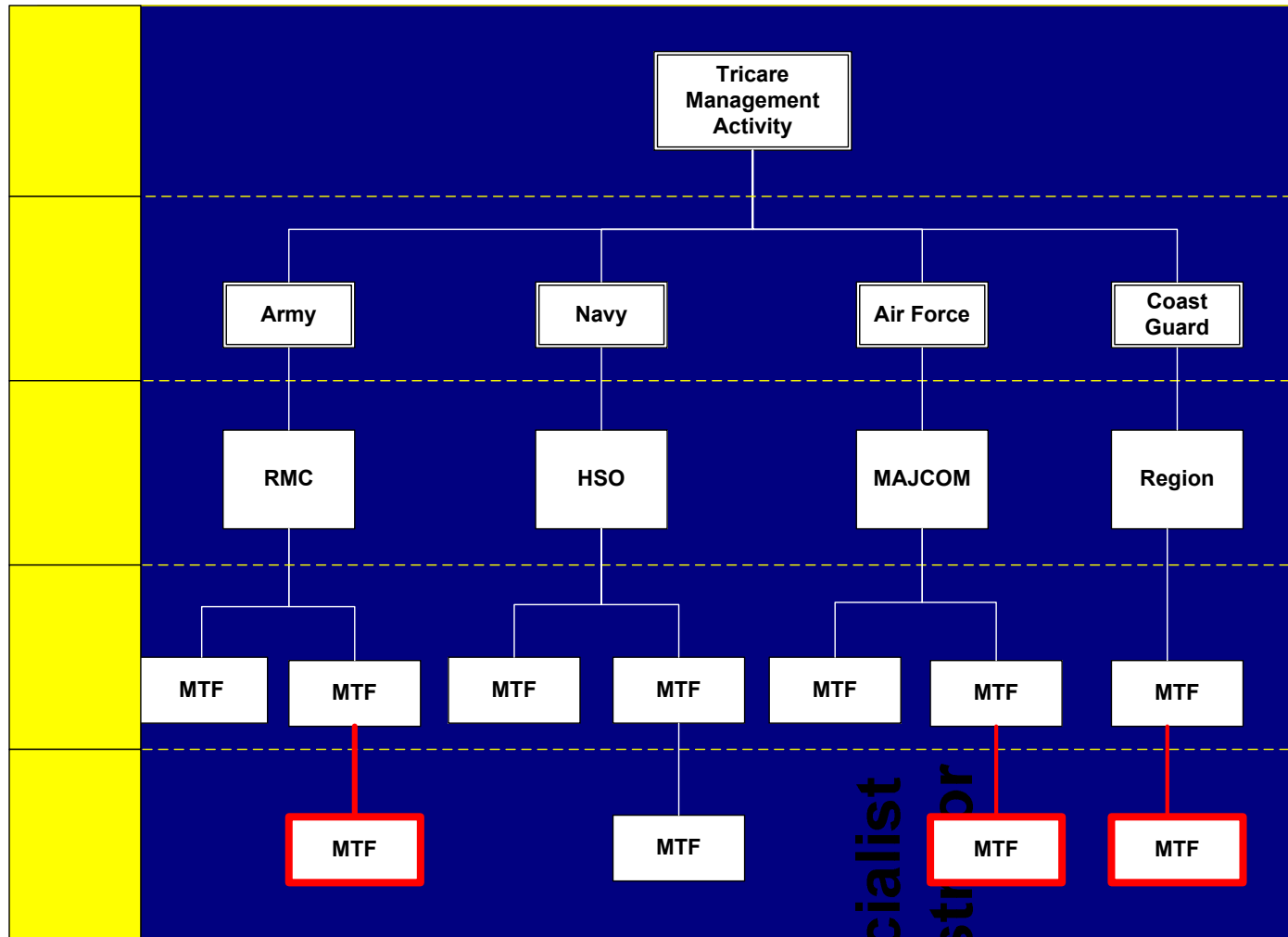
- **User** - an individual with a unique login ID and Password assigned to an organization within the tool
- **Organization** - a logical or physical entity such as an MTF, a Service or TRICARE Management Activity
- **Role** - a named collection of permissions within the tool
A user can have the same roles in multiple organizations, or different roles in multiple organizations

User Roles and Permissions

- **User Admin** is a local admin for an MTF or a designated Service. This role allows one to add/modify users from within their Service and assign roles. This role will be handled by the email account administrators for each MTF or Service
- **Privacy Specialist** is the Privacy Officer or designee at an MTF or Service level. This role allows the user to maintain disclosure reporting, approve/deny disclosure requests, amendments to requests, restrictions to disclosures, disclosure suspensions and generate associated letters
- **Regular User** is a general role with basic functionality. This role can create disclosures and authorization requests that can be routed on to a Privacy Specialist

PHIMT Overview

Hierarchy



*  These do not exist at this point, but can be added to the PHIMT

PHIMT Overview

Summary

- You should now be familiar with the:
 - COTS product customization
 - PHIMT Terminology
 - User roles and associated permissions
 - Hierarchy

PHIMT User Interface

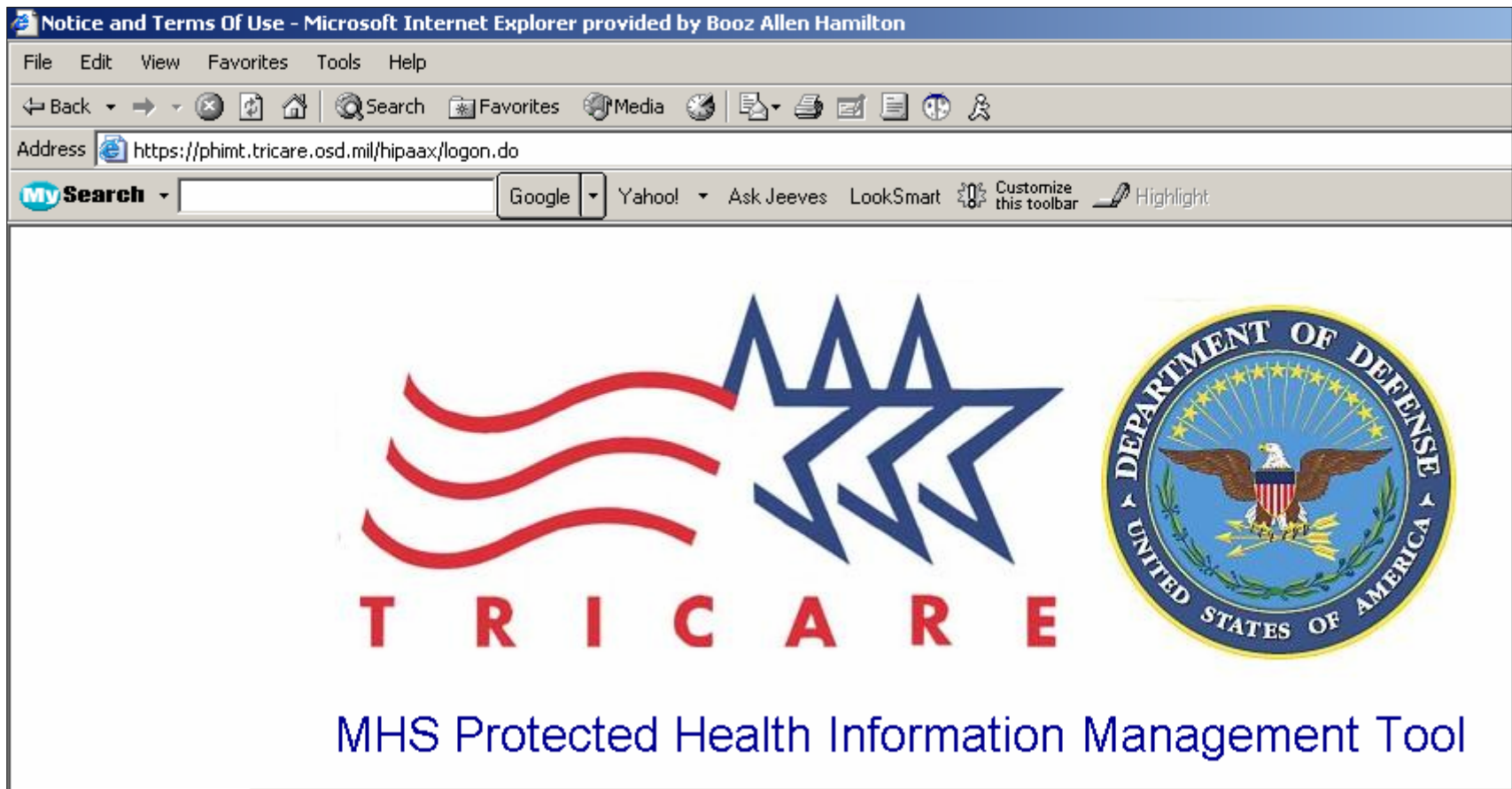
PHIMT User Interface

Objectives

- Upon completion of this lesson, you will be able to locate the:
 - Login Screen
 - Patient Tab
 - User Tab
 - Admin Tab
 - Requests Tab
 - Requester Tab

PHIMT User Interface Login Screen

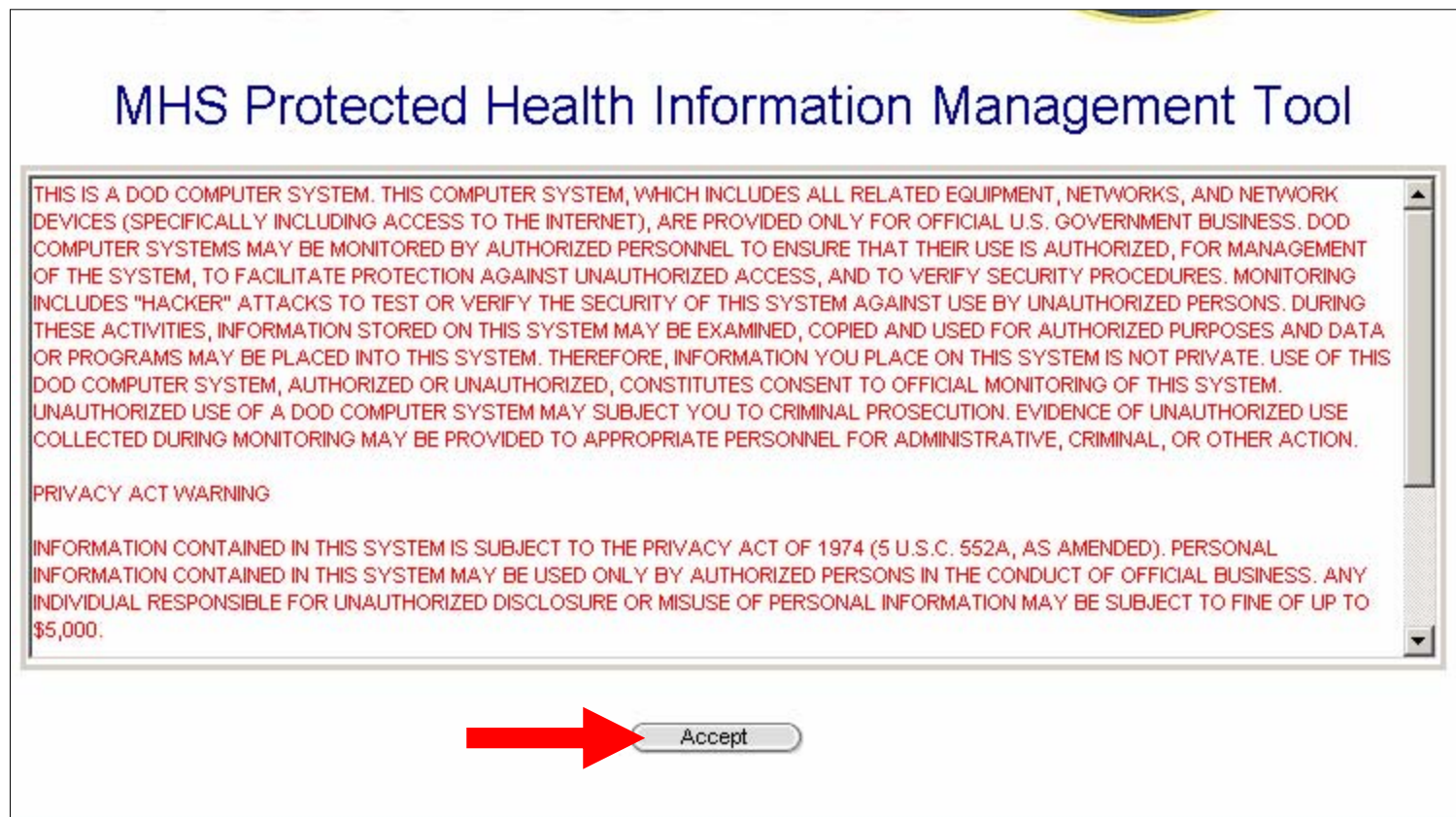
1. Enter the URL: <https://phimt.tricare.osd.mil>



PHIMT User Interface

Login Screen

2. Read the Notice and Terms of Use
3. Click on the **Accept** button



PHIMT User Interface

Login Screen

3. Type in User Name and Password
4. Click on the [Login](#) button



T R I C A R E

MHS Protected Health Information Management
Tool

You are logging into the production server.
Information in this version will be retained.

User Name:

Password:

Login

Enter your User Name and Password to login.

PHIMT User Interface

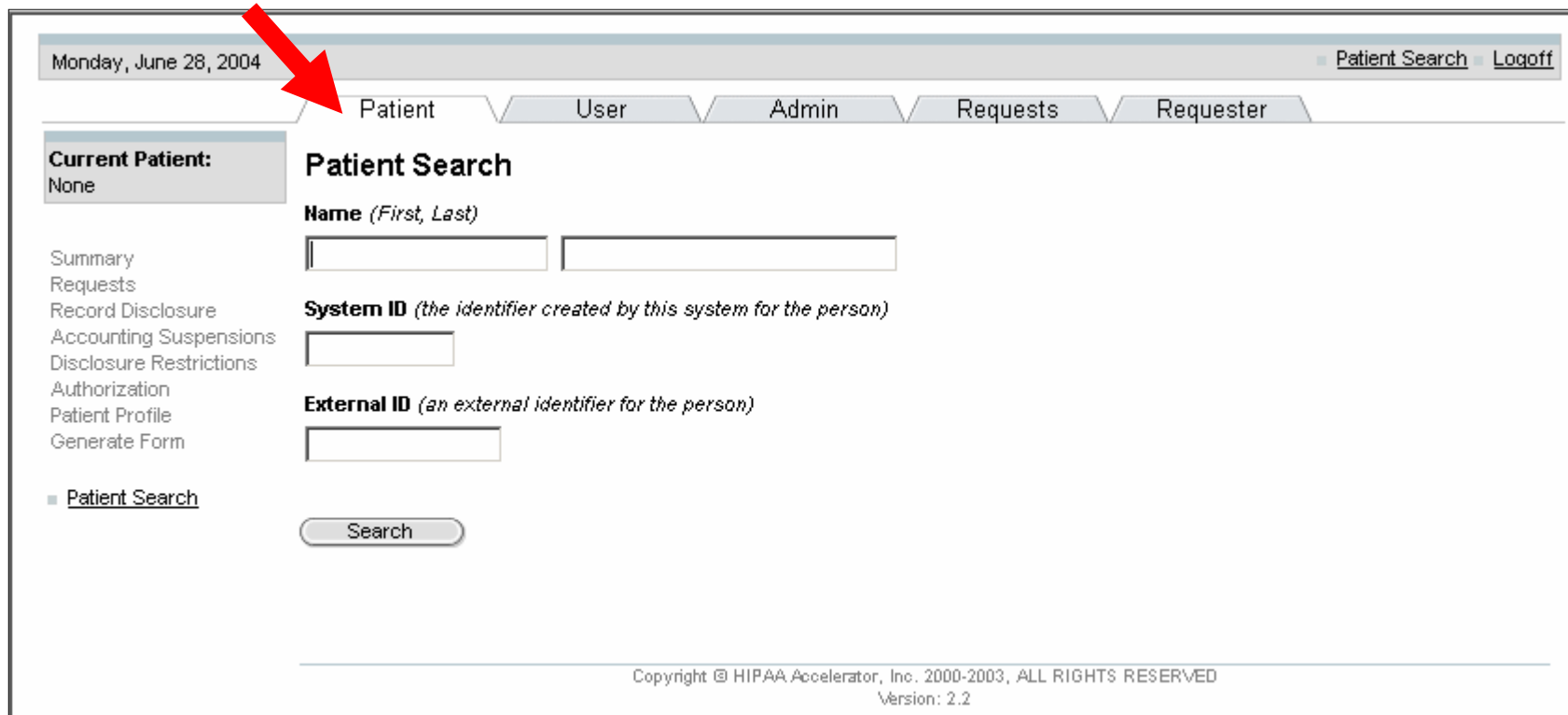
Tabs



- Patient
- User
- Admin
- Requests
- Requester

PHIMT User Interface

Patient Tab



Monday, June 28, 2004 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
None

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile
Generate Form

[Patient Search](#)

Patient Search

Name *(First, Last)*

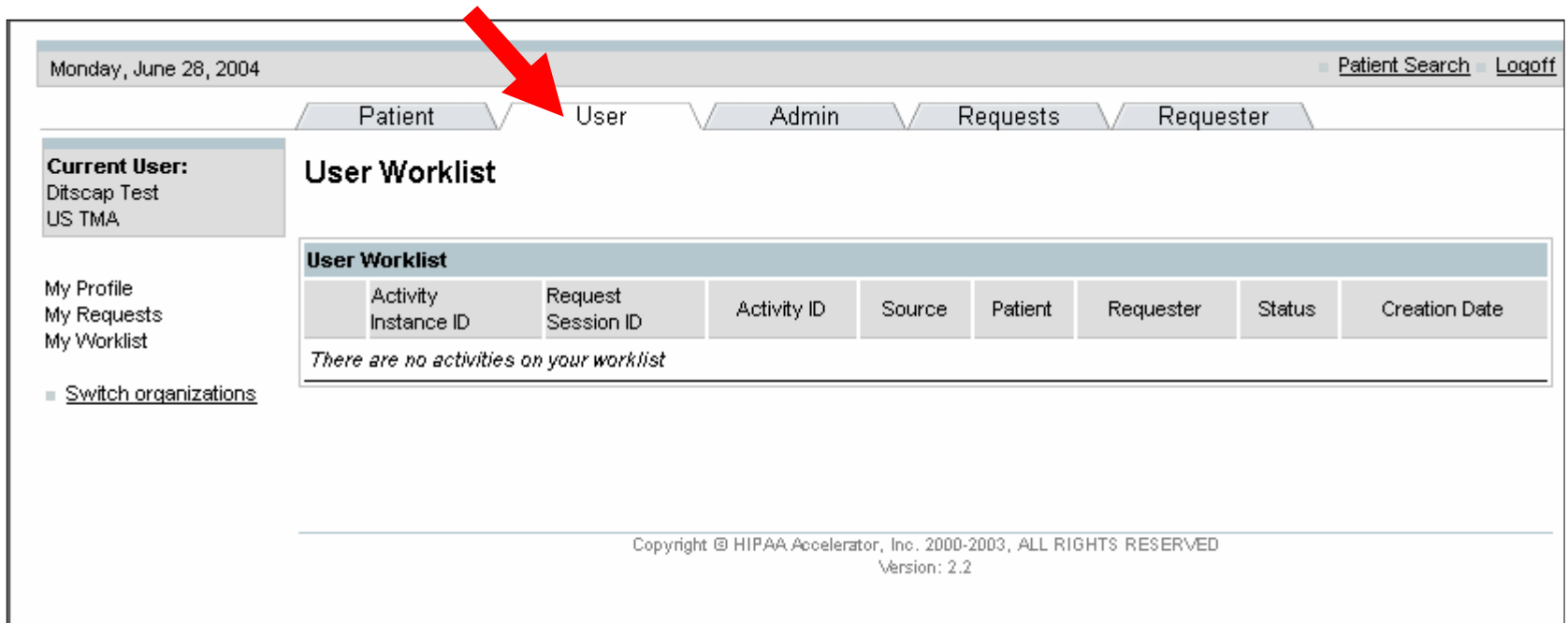
System ID *(the identifier created by this system for the person)*

External ID *(an external identifier for the person)*

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PHIMT User Interface

User Tab



The screenshot displays the PHIMT User Interface. At the top, a header bar shows the date "Monday, June 28, 2004" on the left and links for "Patient Search" and "Logoff" on the right. Below the header is a navigation bar with five tabs: "Patient", "User", "Admin", "Requests", and "Requester". A red arrow points to the "User" tab, which is currently selected. On the left side of the interface, there is a sidebar with the text "Current User: Ditscap Test US TMA" and a list of links: "My Profile", "My Requests", "My Worklist", and "Switch organizations". The main content area is titled "User Worklist" and contains a table with the following columns: "Activity Instance ID", "Request Session ID", "Activity ID", "Source", "Patient", "Requester", "Status", and "Creation Date". Below the table, a message states "There are no activities on your worklist". At the bottom of the page, a footer contains the copyright notice "Copyright © HIPAA Accelerator, Inc. 2000-2003, ALL RIGHTS RESERVED" and the version number "Version: 2.2".

Monday, June 28, 2004 [Patient Search](#) [Logoff](#)

Patient **User** Admin Requests Requester

Current User:
Ditscap Test
US TMA

My Profile
My Requests
My Worklist

[Switch organizations](#)

User Worklist

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
There are no activities on your worklist							

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PHIMT User Interface

Admin Tab

Monday, June 28, 2004 [Patient Search](#) [Logoff](#)

[Patient](#) [User](#) [Admin](#) [Requests](#) [Requester](#)

Current Admin:
Ditscap Test
US TMA

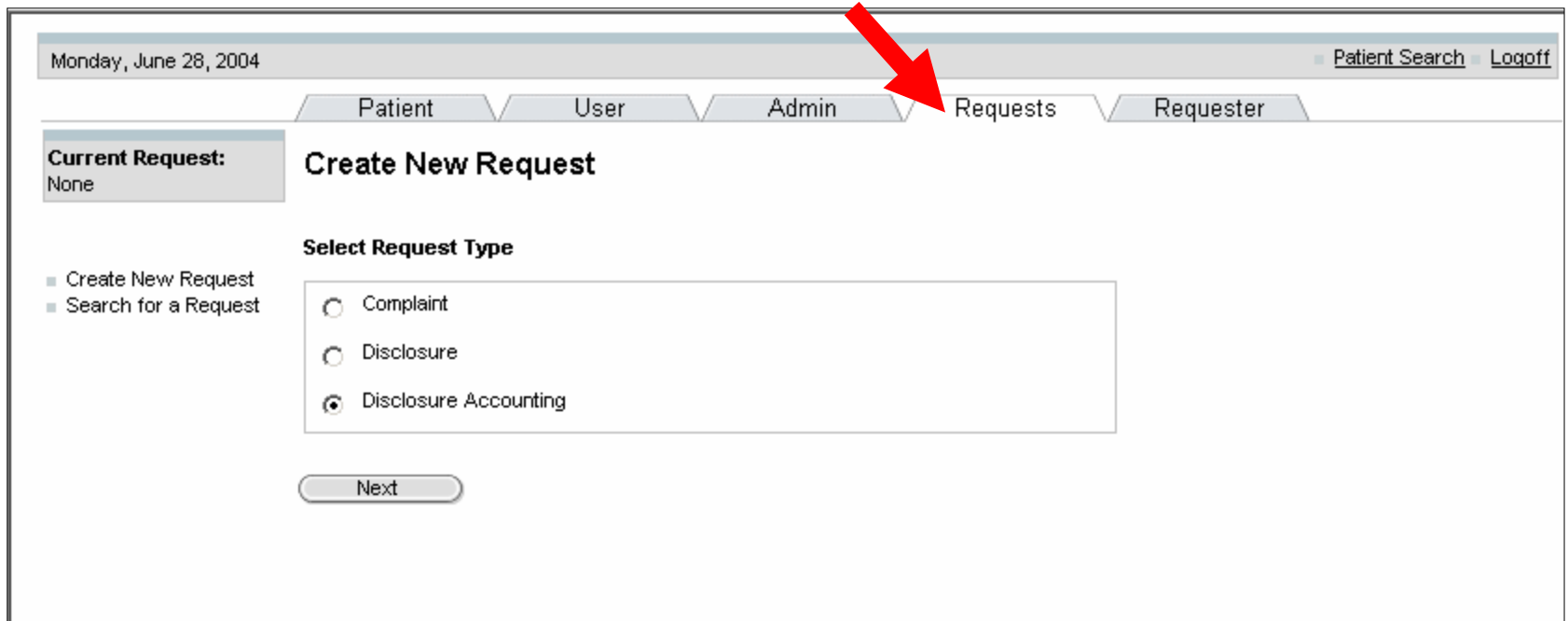
Administrative Summary
Organizations
Queue Users
Disclosure Imports
Disclosure Imports History

Organizations

Origin Organizations					
ID	Name	Parent Name	Address	Contact Person	Contact Phone
481	10th MED GROUP-USAF ACADEMY CO	US Air Force	4102 Pinion Drive Ste 4000 USAF Academy, CO 80840		
3757	10th Med GROUP- PETERSON AFB	HQ AIR FORCE SPACE COMMAND			
442	11TH MED GRP-BOLLING	HQ Air Force (Direct reporting unit)	238 Brookley Avenue RM 125 Bolling AFB, DC 20032		
3719	11th Wing	US Air Force	11 MDG/SGHQ 238 238 Brookley Ave Bolling AFB, DC 20032		
308	121ST GEN HOSP SEOUL	18th MEDCOM - KOREA	Unit # 15244 APO AP , 96205		
441	12th MED GRP-RANDOLPH	HQ AIR EDUCATION & TRAINING COMMAND	221 3rd Street West Randolph AFB, TX 78150		
434	14th MED GRP-COLUMBUS	HQ AIR EDUCATION & TRAINING COMMAND	201 Independence Dr Columbus AFB, MS 39701		

PHIMT User Interface

Requests Tab



Monday, June 28, 2004 [Patient Search](#) [Logoff](#)

Patient User Admin **Requests** Requester

Current Request:
None

- Create New Request
- Search for a Request

Create New Request

Select Request Type

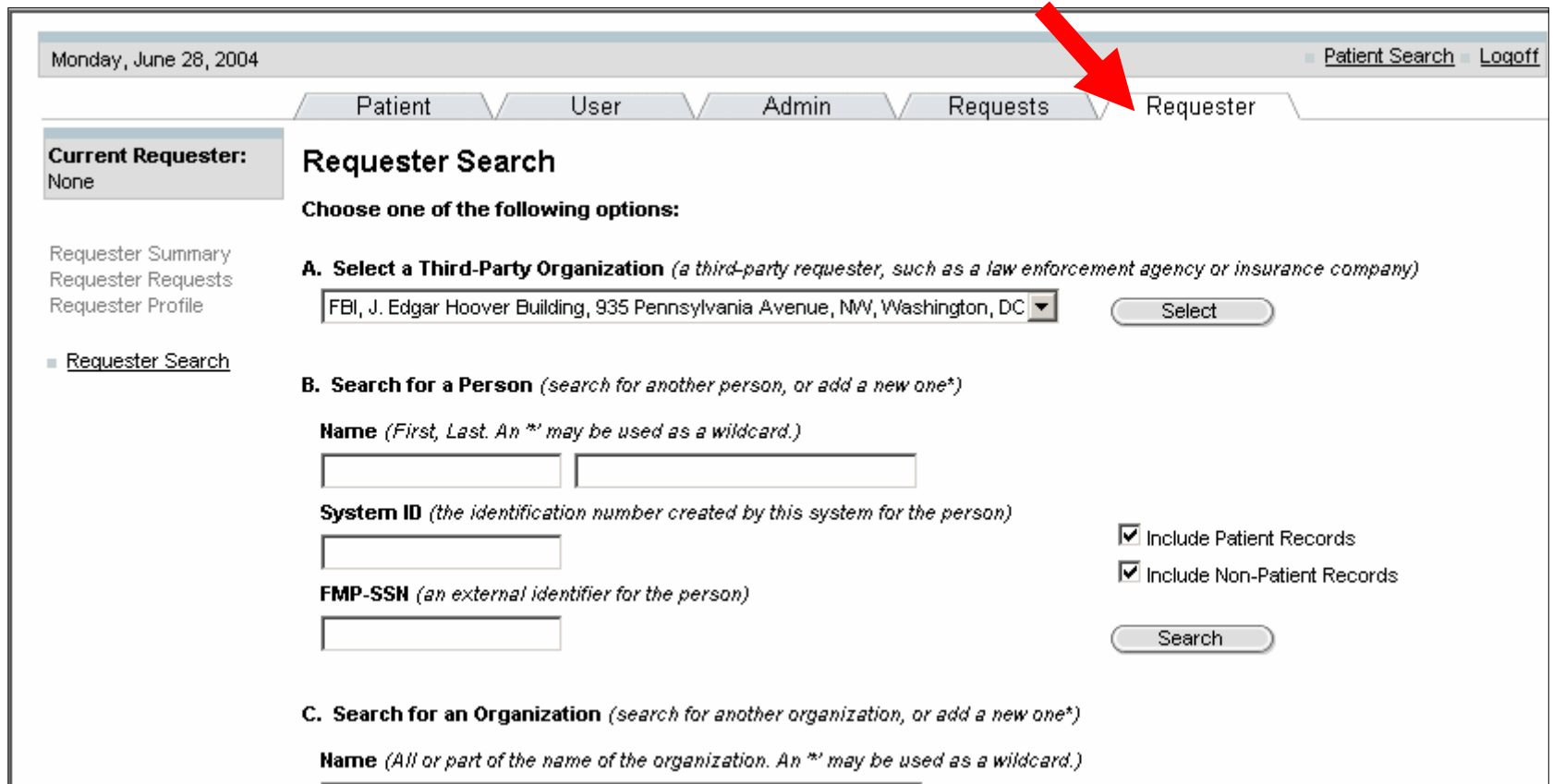
☐ Complaint

☐ Disclosure

☒ Disclosure Accounting

PHIMT User Interface

Requester Tab



Monday, June 28, 2004 [Patient Search](#) [Logoff](#)

[Patient](#) [User](#) [Admin](#) [Requests](#) **[Requester](#)**

Current Requester:
None

[Requester Summary](#)
[Requester Requests](#)
[Requester Profile](#)

■ [Requester Search](#)

Requester Search

Choose one of the following options:

A. Select a Third-Party Organization *(a third-party requester, such as a law enforcement agency or insurance company)*

FBI, J. Edgar Hoover Building, 935 Pennsylvania Avenue, NW, Washington, DC ▼

B. Search for a Person *(search for another person, or add a new one*)*

Name *(First, Last. An * may be used as a wildcard.)*

System ID *(the identification number created by this system for the person)*

FMP-SSN *(an external identifier for the person)*

☒ Include Patient Records
☒ Include Non-Patient Records

C. Search for an Organization *(search for another organization, or add a new one*)*

Name *(All or part of the name of the organization. An * may be used as a wildcard.)*

PHIMT User Interface

Summary

- You should now be able to locate the:
 - Login Screen
 - Patient Tab
 - User Tab
 - Admin Tab
 - Requests Tab
 - Requester Tab

User Admin Functionality

User Admin Functionality

Objectives

- Upon completion of this lesson, you will be able to:
 - Describe the process of obtaining a User Admin account
 - Create user accounts
 - Setup a workflow
 - Setup a queue
 - Create requester favorites
 - Disable users
 - Transfer users

Obtain a User Admin Account

- Requests for User Admins to be created must be routed to and approved by the Service Representative
- The Service Representative will route the approved request to the HIPAA Support Center
- The HIPAA Support Center will establish the User Admin account and provide the User Admin login information to the appropriate individual

Create User Accounts

- The User Admin is responsible for adding users and assigning roles to the users within their organization
- User Admin provides the user with their login information
- Determined by Service specific requirements or MTF requirements

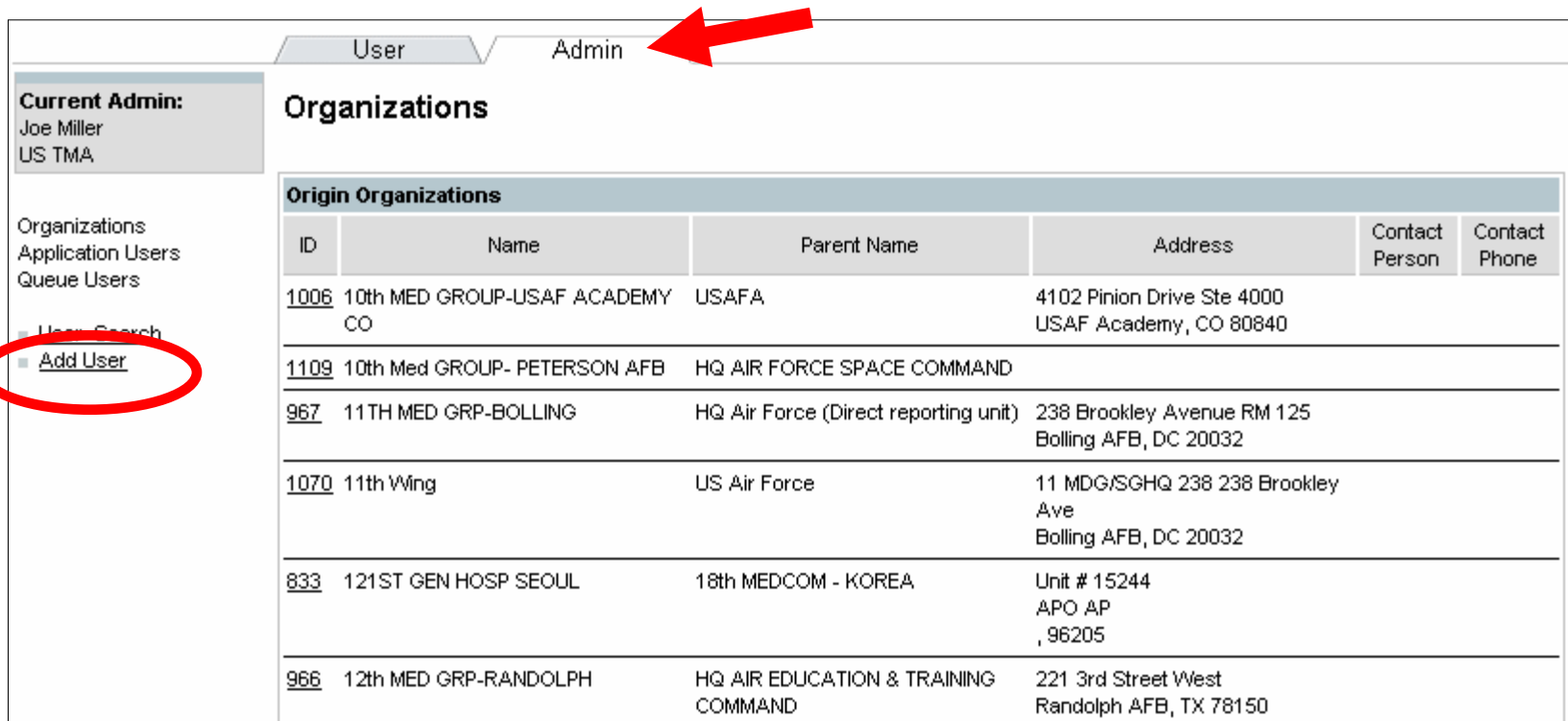
User ID and Password Requirements

- User ID:
 - Assigned by the User Admin, usually first initial of the first name and complete last name (follow Service guidelines)
 - Duplicate User Name not allowed by the application
- Password:
 - 6-15 characters long and must contain at least one
 - Alphabetical uppercase character
 - Alphabetical lower case character
 - Arabic numeral (0, 1, 2, 3, 4)
 - Non-alphanumeric special character (I.e. !, @, #, \$, etc.)

User Admin Functionality

Create User Accounts (1 of 3)

1. Select the [Admin Tab](#)
2. Select the [Add User](#) hyperlink



The screenshot displays the 'User Admin' interface. At the top, there are two tabs: 'User' and 'Admin'. A red arrow points to the 'Admin' tab, indicating it should be selected. On the left side, there is a sidebar with a 'Current Admin' section showing 'Joe Miller' and 'US TMA'. Below this, there are links for 'Organizations', 'Application Users', and 'Queue Users'. The 'Add User' link is highlighted with a red circle. The main content area is titled 'Organizations' and contains a table of 'Origin Organizations'.

ID	Name	Parent Name	Address	Contact Person	Contact Phone
1006	10th MED GROUP-USAF ACADEMY CO	USAFA	4102 Pinion Drive Ste 4000 USAF Academy, CO 80840		
1109	10th Med GROUP- PETERSON AFB	HQ AIR FORCE SPACE COMMAND			
967	11TH MED GRP-BOLLING	HQ Air Force (Direct reporting unit)	238 Brookley Avenue RM 125 Bolling AFB, DC 20032		
1070	11th Wing	US Air Force	11 MDG/SGHQ 238 238 Brookley Ave Bolling AFB, DC 20032		
833	121ST GEN HOSP SEOUL	18th MEDCOM - KOREA	Unit # 15244 APO AP , 96205		
966	12th MED GRP-RANDOLPH	HQ AIR EDUCATION & TRAINING COMMAND	221 3rd Street West Randolph AFB, TX 78150		

Create User Accounts (2 of 3)

3. Enter user information (name, phone number and email address)
4. Enter a unique User ID (No duplicate IDs are allowed across all Services)

The screenshot shows the 'User Profile' form in the 'User Admin' interface. The form is titled 'User Profile' and is part of the 'User' tab. It contains several fields for user information:

- Name** (First, Middle, Last, Sr/Jr.): Fred [] Thomas []
- Phone Number** (area code, phone number(XXX-XXXX), and extension if applicable): (703) 555-5555 ext. []
(Please note, this phone number will be displayed on letters as contact information.)
- System ID** (the identifier created by this system for the person): 0
- User ID** (user login name): fthomas
- Email** (example: johnf@yahoo.com): fthomas@tricare.osd.mil

The 'Name' field is highlighted with a red box.

User Admin Functionality

Create User Accounts (3 of 3)

5. Enter a temporary new password and confirm new password
6. Select organization from the drop-down box and select the appropriate user role
7. Click on the **Save** button

The screenshot shows a web form for creating user accounts. A red box highlights the 'New Password' and 'Confirm New Password' fields. A red arrow points from a text box to the 'Signature Block' field. Another red arrow points from the 'Save' button at the bottom to the left. The 'User Roles' section includes a table with columns for Organization, Privacy Specialist, Regular User, User Admin, and Primary. The 'Organization' dropdown is set to 'US TMA'. The 'Regular User' checkbox is checked.

New Password

Confirm New Password

Signature Block *(Please note, this text will display in a letter's signature block)*

Comments *(general comments about or for the user)*

User Roles

Organization	Privacy Specialist	Regular User	User Admin	Primary
US TMA	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>

Save

Users can update the information in the signature block from their User Profile. Follow Service specific requirements

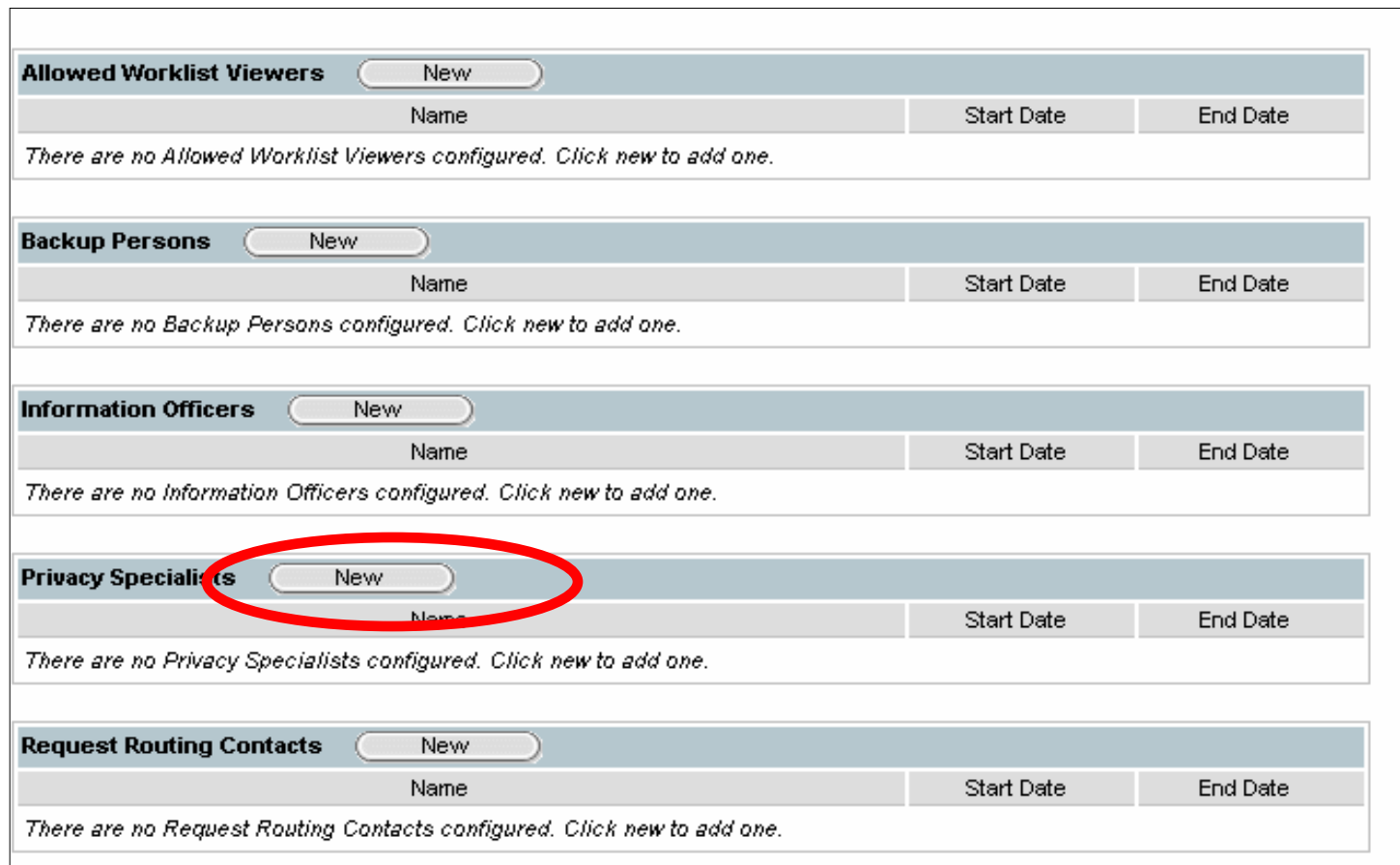
Workflow Setup (1 of 6)

- Once a user has been added and their organization and user role is established, the User Admin can establish the workflow for that user's disclosures
- The workflow delineates the process by which requests are routed within the system
- Workflows should be set up so that a Regular Users work will be routed to a Privacy Specialist for approval or denial

User Admin Functionality

Workflow Setup (2 of 6)

1. Scroll to the bottom of the User Profile screen
2. Click on the **New** button next to Privacy Specialists



Allowed Worklist Viewers [New](#)

Name	Start Date	End Date
There are no Allowed Worklist Viewers configured. Click new to add one.		

Backup Persons [New](#)

Name	Start Date	End Date
There are no Backup Persons configured. Click new to add one.		

Information Officers [New](#)

Name	Start Date	End Date
There are no Information Officers configured. Click new to add one.		

Privacy Specialists [New](#)

Name	Start Date	End Date
There are no Privacy Specialists configured. Click new to add one.		

Request Routing Contacts [New](#)

Name	Start Date	End Date
There are no Request Routing Contacts configured. Click new to add one.		

User Admin Functionality

Workflow Setup (3 of 6)

3. Enter search criteria
4. Click on the **Search** button

The screenshot displays a web application interface for user administration. At the top, a header bar shows the date 'Thursday, June 24, 2004' and a 'Logoff' link. Below the header, there are two tabs: 'User' and 'Admin'. The 'User' tab is selected, and the page title is 'User Profile \ User Search'. On the left side, there is a sidebar with the following content: 'Current User: Joe Miller, US TMA', 'My Profile', 'My Requests', 'My Worklist', and a link 'Switch organizations'. The main content area contains a search form with two input fields for 'Name (First, Last)' containing 'Joe' and 'Smith', and a 'System ID' field with a placeholder text '(the identifier created by this system for the person)'. A red rectangle highlights the search form fields. Below the form is a 'Search' button, which is pointed to by a large red arrow. At the bottom of the page, there is a footer with the text 'Copyright © HIPAA Accelerator, Inc. 2000-2003, ALL RIGHTS RESERVED' and 'Version: 2.2'.

Thursday, June 24, 2004 [Logoff](#)

User Admin

Current User:
Joe Miller
US TMA

My Profile
My Requests
My Worklist

[Switch organizations](#)

User Profile \ User Search

Name (First, Last)

System ID (the identifier created by this system for the person)

Search

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User Admin Functionality

Workflow Setup (4 of 6)

5. Select the appropriate Privacy Specialist from the search results and click on the **Select** button

The screenshot displays a web application interface for user administration. At the top, a header bar shows the date 'Thursday, June 24, 2004' and a 'Logoff' link. Below the header, there are two tabs: 'User' and 'Admin'. The 'User' tab is active, and the page title is 'User Profile \ User Search'. On the left side, there is a sidebar with the following elements: 'Current User: Joe Miller, US TMA', a list of links ('My Profile', 'My Requests', 'My Worklist'), and a 'Switch organizations' link. The main content area is titled 'Search Results' and contains a table with the following data:

ID	Name	SSN	Birth Date	Address
64	Joe Smith			

Below the table, there is a 'Select' button and a link that says 'Other options: Adjust your search criteria and try again.' Two red arrows are overlaid on the image: one pointing from the 'My Profile' link in the sidebar to the search results table, and another pointing from the 'Select' button to the search results table. At the bottom of the page, there is a copyright notice: 'Copyright © HIPAA Accelerator, Inc. 2000-2003, ALL RIGHTS RESERVED' and 'Version: 2.2'.

User Admin Functionality

Workflow Setup (5 of 6)

6. Set Relationship Start Date / End Date (End Date optional)
7. Click on the **Save** button

Thursday, June 24, 2004 [Logoff](#)

User Admin

Current User:
Joe Miller
US TMA

User Profile \ Privacy Specialist Details

Related Person: Joe Smith

Relationship Start Date (MANDATORY: the date when the relationship began or will begin)
06/24/2004

Relationship End Date (OPTIONAL: the date when the relationship ended or will end)

[Switch organizations](#)

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User Admin Functionality

Workflow Setup (6 of 6)

8. Privacy Specialist is added to the User Profile screen

Allowed Worklist Viewers New		
Name	Start Date	End Date
There are no Allowed Worklist Viewers configured. Click new to add one.		

Backup Persons New		
Name	Start Date	End Date
There are no Backup Persons configured. Click new to add one.		

Information Officers New		
Name	Start Date	End Date
There are no Information Officers configured. Click new to add one.		

Privacy Specialists New		
Name	Start Date	End Date
<u>Joe Smith</u>	06/24/2004	

Request Routing Contacts New		
Name	Start Date	End Date
There are no Request Routing Contacts configured. Click new to add one.		

Queue Setup (1 of 7)


- A queue is a distribution list for a specific organization that is comprised of two or more Privacy Specialists
- The User Admin at the local command sets up queues
- Queues are created to expedite the process of approving/denying a disclosure
- Only users affiliated with a given organization will see that organization's routing options

User Admin Functionality

Queue Setup (2 of 7)

1. Select **Admin Tab**
2. Select the **Queue Users** hyperlink

Thursday, June 24, 2004 [Logoff](#)

User **Admin** 

Current Admin:
Joe Miller
US TMA

Organizations
Application Users
Queue Users

[User Search](#)
[Add User](#)

Organizations

Origin Organizations					
ID	Name	Parent Name	Address	Contact Person	Contact Phone
1006	10th MED GROUP-USAFA ACADEMY CO	USAFA	4102 Pinion Drive Ste 4000 USAFA Academy, CO 80840		
1109	10th Med GROUP- PETERSON AFB	HQ AIR FORCE SPACE COMMAND			
967	11TH MED GRP-BOLLING	HQ Air Force (Direct reporting unit)	238 Brookley Avenue RM 125 Bolling AFB, DC 20032		
1070	11th Wing	US Air Force	11 MDG/SGHQ 238 238 Brookley Ave Bolling AFB, DC 20032		
833	121ST GEN HOSP SEOUL	18th MEDCOM - KOREA	Unit # 15244 APO AP , 96205		

User Admin Functionality

Queue Setup (3 of 7)

3. Click on **New**

Thursday, June 24, 2004 [Logoff](#)

User Admin

Current Admin:
Joe Miller
US TMA

Organizations
Application Users
Queue Users

- [User Search](#)
- [Add User](#)

User Queues

User Queues **New**

ID	Queue Name
----	------------

Save

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Version: 2.2

User Admin Functionality

Queue Setup (4 of 7)

4. Enter the description of Queue in the text box
5. Click on the **Save** button (screen will not change)
6. Once saved, select the **Queue Users** hyperlink

Thursday, June 24, 2004 [Logoff](#)

User Admin

Current Admin:
Joe Miller
US TMA

Organizations
Application Users
Queue Users

[User Search](#)
[Add User](#)

User Queues

[New](#)

ID	Queue Name
1	TMA Medical Clinic

[Save](#)

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User Admin Functionality

Queue Setup (5 of 7)

7. Select the Queue you created from the drop-down box

The screenshot shows the 'User Admin' interface with the 'Queue Setup' section. The 'User Queue' dropdown menu is highlighted with a red circle and contains the text 'TMA Medical Clinic'. The interface includes tabs for 'User' and 'Admin', a 'Current Admin' section, and lists for 'Queue Members' and 'All Other Users'.

Current Admin:
Joe Miller
US TMA

Queue Users

User Queue: TMA Medical Clinic

Queue Members

All Other Users

Mike Beedle
John Cerwin
Andy Cirillo
Liza Dorsey
Chris Foster
Joe Johnson
Joe Jones
Igor Mameshin
Joe Miller
Joe Smith
Wyatt Sutherland
Pradeep Thaivalappil
Vladimir Tokarskiy
Satish Unni

◀ Enable

▶ Disable

User Admin Functionality

Queue Setup (6 of 7)

8. Select the users that you want to add to the queue and click on **Enable**
9. Click on the **Save** button

The screenshot displays the 'Queue Users' interface. On the left, a sidebar shows the 'Current Admin' as Joe Miller (US TMA) and a navigation menu with 'Organizations', 'Application Users', and 'Queue Users'. The 'Queue Users' section is active, showing 'User Search' and 'Add User' links. The main area is titled 'Queue Users' and features a 'User Queue' dropdown set to 'TMA Medical Clinic' with a 'Modify' button. Below this, there are two columns: 'Queue Members' and 'All Other Users'. The 'Queue Members' column lists Joe Miller, Joe Smith, John Cerwin, and Pradeep Thaivalappil. The 'All Other Users' column lists Andy Cirillo, Chris Foster, Igor Mameshin, Joe Johnson, Joe Jones, Liza Dorsey, Mike Beedle, Satish Unni, Vladimir Tokarskiy, and Wyatt Sutherland. A red arrow points to the 'Enable' button, which is circled in red. Another red arrow points to the 'Save' button at the bottom of the interface.

Current Admin:
Joe Miller
US TMA

Organizations
Application Users
Queue Users

■ [User Search](#)
■ [Add User](#)

Queue Users

User Queue: TMA Medical Clinic [Modify]

Queue Members

- Joe Miller
- Joe Smith
- John Cerwin
- Pradeep Thaivalappil

All Other Users

- Andy Cirillo
- Chris Foster
- Igor Mameshin
- Joe Johnson
- Joe Jones
- Liza Dorsey
- Mike Beedle
- Satish Unni
- Vladimir Tokarskiy
- Wyatt Sutherland

◀ Enable

▶ Disable

Save

User Admin Functionality

Queue Setup (7 of 7)

10. The Queue that you added will show up in the user's worklist

Thursday, June 24, 2004 [Logoff](#)

User Admin

Current User:
Joe Miller
US TMA

My Profile
My Requests
My Worklist

[Switch organizations](#)

User Worklist

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
There are no activities on your worklist							

TMA Medical Clinic Worklist

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
There are no activities for this queue							

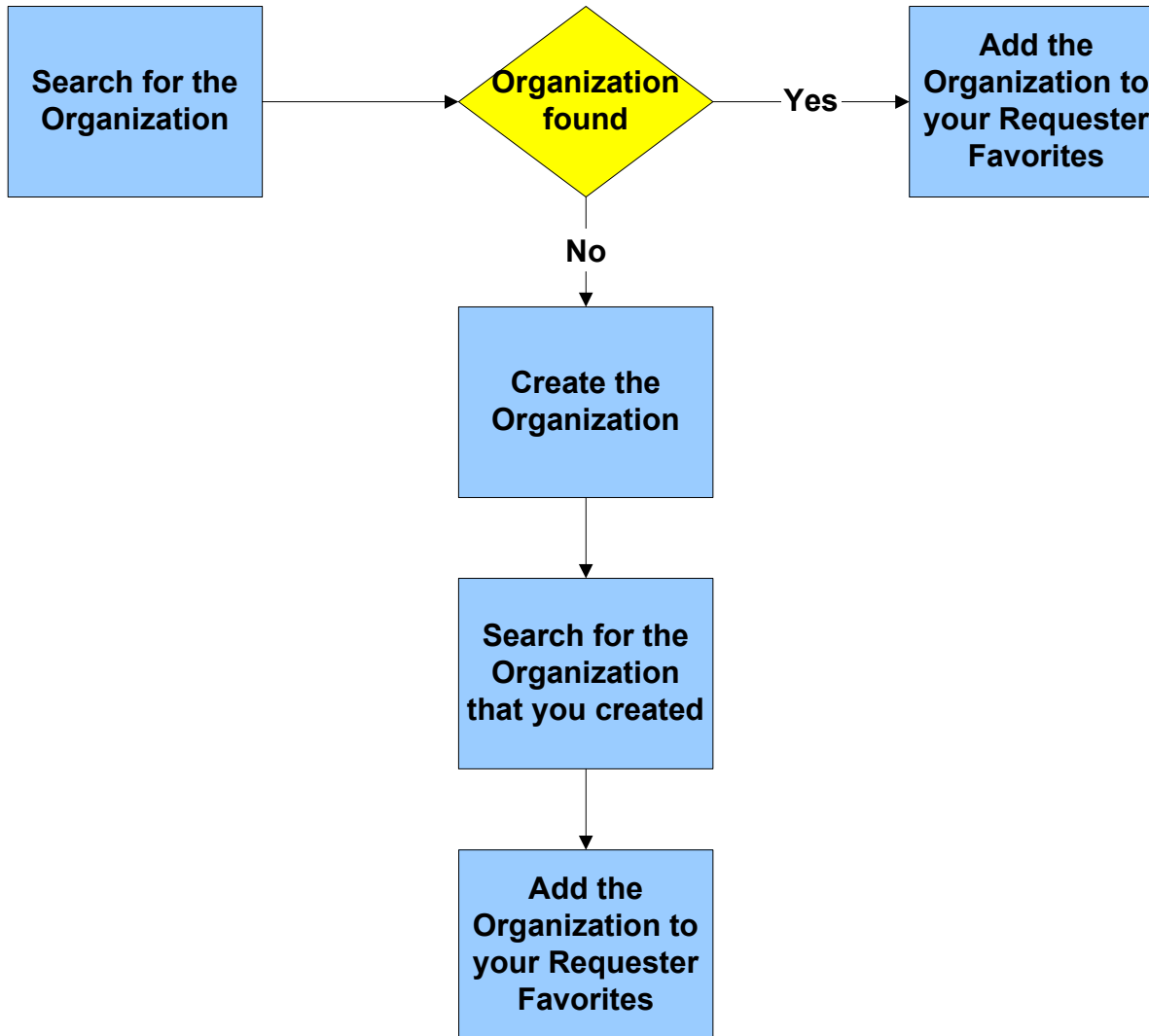
Accept

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Requester Favorites (1 of 2)

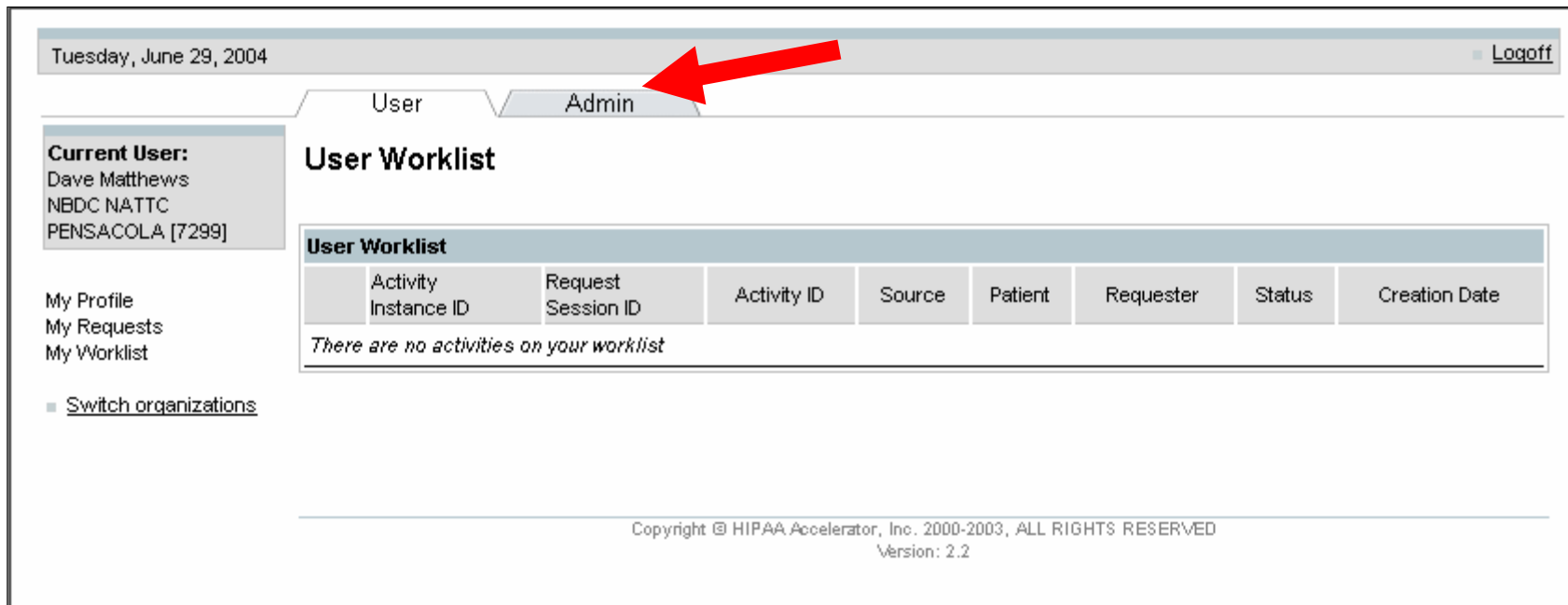
- An organization can create a list of requester "favorites" that show up in the requester drop-down list box
- User Admins can set up the list of favorites per organization
- If an organization name is not in the favorites list, the user will be allowed to search for it manually
- A given "requester" can appear in multiple "favorites" lists

Requester Favorites (2 of 2)



Requester Favorites- Searching for Organization (1 of 5)

1. Select the Admin Tab



The screenshot displays a web application interface for user administration. At the top, a header bar shows the date "Tuesday, June 29, 2004" and a "Logoff" link. Below the header, there are two tabs: "User" and "Admin". A red arrow points to the "Admin" tab, indicating it should be selected. On the left side, there is a sidebar with the "Current User" information: "Dave Matthews", "NBDC NATTC", and "PENSACOLA [7299]". Below this, there are links for "My Profile", "My Requests", and "My Worklist", along with a "Switch organizations" link. The main content area is titled "User Worklist" and contains a table with the following columns: "Activity Instance ID", "Request Session ID", "Activity ID", "Source", "Patient", "Requester", "Status", and "Creation Date". The table is currently empty, and a message below it states "There are no activities on your worklist". At the bottom of the page, there is a copyright notice: "Copyright © HIPAA Accelerator, Inc. 2000-2003, ALL RIGHTS RESERVED" and "Version: 2.2".

Tuesday, June 29, 2004 [Logoff](#)

User Admin

Current User:
Dave Matthews
NBDC NATTC
PENSACOLA [7299]

My Profile
My Requests
My Worklist

[Switch organizations](#)

User Worklist

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
There are no activities on your worklist							

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Requester Favorites- Searching for Organization (2 of 5)

2. Select the **Organizations** hyperlink
3. Select the **ID** hyperlink for your Origin Organization

Tuesday, June 29, 2004 [Logoff](#)

User Admin

Current Admin:
Dave Matthews
NBDC NATTC
PENSACOLA [7299]

Organizations

Origin Organizations

ID	Name	Parent Name	Address	Contact Person	Contact Phone
864	NBDC NATTC PENSACOLA	NDC GULFCOAST	BLDG 3911 760 East Avenue Ste B Pensacola, FL 32508		

[User Search](#)
[Add User](#)

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Requester Favorites- Searching for Organization (3 of 5)

4. Scroll down to Favored Requesters and click on the [Add](#) button

Update

Contact People

ID	Name	Phone	Address	Primary
There are currently no contact people associated with this organization. Click new to add one.				

Child Organizations

ID	Name	Address	Contact Person	Contact Phone	Active
There are currently no child organizations associated with this organization. Click new to add one.					

Favored Requesters

ID	Name	Address
There are currently no favored requesters associated with this organization. Click new to add one.		

Associated Addresses

ID	Street	City	State	Zip	Alternate	Primary
709	4102 Pinion Drive Ste 4000	USAF Academy	CO	80840	No	<input checked="" type="radio"/>

Requester Favorites- Searching for Organization (4 of 5)

5. Enter organization search criteria
6. Click on the **Search** button

Tuesday, June 29, 2004 [Logoff](#)

User Admin

Current Admin:
Dave Matthews
NBDC NATTC
PENSACOLA [7299]

Organizations
Application Users
Queue Users

[User Search](#)
[Add User](#)

Requester Search

Choose one of the following options:

A. Search for a Person (search for another person, or add a new one*)

Name (First, Last. An * may be used as a wildcard.)

System ID (the identification number created by this system for the person)

FMP-SSN (an external identifier for the person)

☒ Include Patient Records
☒ Include Non-Patient Records

B. Search for an Organization (search for another organization, or add a new one*)

Name (All or part of the name of the organization. An * may be used as a wildcard.)

DNIS Code (the external identifier for the organization)

Requester Favorites- Searching for Organization (5 of 5)

7. If requester is not found, click on "Create a new requester as an organization"

Tuesday, June 29, 2004 [Logoff](#)

User **Admin**

Current Admin:
Dave Matthews
NBDC NATTC
PENSACOLA [7299]

Organizations
Application Users
Queue Users

[User Search](#)
[Add User](#)

Requester Search Results

Search Results		
ID	Name	Address
There were no results that matched your search criteria.		

Other options:
[Adjust your search criteria and try again.](#)
[Create a new requester as a person.](#)
[Create a new requester as an organization.](#)

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Requester Favorites- Adding New Organization (1 of 4)

8. Enter the name of the Organization
9. Select the organization type from the drop-down box

Tuesday, June 29, 2004 [Logoff](#)

User Admin

Current Admin:
Dave Matthews
NBDC NATTC
PENSACOLA [7299]

Organizations
Application Users
Queue Users

[User Search](#)
[Add User](#)

Organization Details

Name *(is a subsidiary, start the organization name with its parent's name)*

Type

DMIS Code *(an optional alternative identifier for the organization)*

Parent Organization
NBDC NATTC PENSACOLA

Alternate Communication Instructions *(special instructions to send correspondence to the organization)*

Requester Favorites- Adding New Organization (2 of 4)

10. Scroll down to the bottom of the screen and click on the **Save** button

Parent Organization
US TMA

Alternate Communication Instructions *(special instructions to send correspondence to the organization)*

Comments *(general comments about or for the organization)*

Primary *(checked if the organization is primary)*
☒

Active *(checked if the organization can be selected for authorizations, disclosures, etc.)*
☒

Origin *(checked if the organization can be selected as an origin for disclosures)*
☐

Requester/Recipient *(checked if the organization can be selected as a requester or recipient for disclosures or requests)*
☒

Save

Requester Favorites- Adding New Organization (3 of 4)

11. Enter the Organization Address Details and click on the **Save** button

Tuesday, June 29, 2004 [Logoff](#)

User Admin

Current Admin:
Dave Matthews
NBDC NATTC
PENSACOLA [7299]

Organizations
Application Users
Queue Users

- User Search
- Add User

Address Details

Address Format (APO and FPO address should use USA format)
USA ☒ International ☐

Address Line 1 (the primary address line)
1411 Jefferson Davis

Address Line 2 (normally a suite or apartment)

City (city name, or APO or FPO)
Arlington

State (two character state identifier: IL, MN, CO, etc., or AA, AE, AP for APO/FPO)
VA

Postal Code (USA: ##### - ####)
20220 -

Timezone (specific timezone for the address)
Eastern

Comments (general comments about or for the address)

Save

Requester Favorites- Adding New Organization (4 of 4)

- If you are entering a International address, select the International radio button

The screenshot shows a web application interface for user administration. At the top, there's a header bar with the date 'Wednesday, July 7, 2004' and a 'Logout' link. Below the header, there are two tabs: 'User' and 'Admin'. The 'Admin' tab is selected. On the left side, there's a sidebar with the following content: 'Current Admin: Joe Miller, US TMA', 'Organizations', 'Application Users', 'Queue Users', and two links: 'User Search' and 'Add User'. The main content area is titled 'Address Details'. It contains the following fields: 'Address Format (APO and FPO address should use USA format)' with 'USA' and 'International' radio buttons; 'Country (country name)' with a dropdown menu showing 'Antigua'; 'International Address Line 1', 'International Address Line 2', and 'International Address Line 3' with text input fields; 'Comments (general comments about or for the address)' with a text area; and a 'Save' button at the bottom. A red arrow points to the 'International' radio button.

Adding Organization to Requester Favorites (1 of 7)

- Once you have created a new organization in the system, you then need to add the organization to your requester favorites
- Once added, the organization will display in your requester favorites drop-down box

Adding Organization to Requester Favorites (2 of 7)

1. Select the [Organizations](#) hyperlink
2. Select the [ID](#) hyperlink for your Origin Organization

Tuesday, June 29, 2004 [Logoff](#)

User Admin

Current Admin:
Dave Matthews
NBDC NATTC
PENSACOLA [7299]

Organizations

Origin Organizations

ID	Name	Parent Name	Address	Contact Person	Contact Phone
864	NBDC NATTC PENSACOLA	NDC GULFCOAST	BLDG 3911 760 East Avenue Ste B Pensacola, FL 32508		

[Organizations](#)
[Application Users](#)
[Queue Users](#)

[User Search](#)
[Add User](#)

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Adding Organization to Requester Favorites (3 of 7)

3. Scroll down to Favored Requesters and click on the [Add](#) button

Contact People

ID	Name	Phone	Address	Primary
There are currently no contact people associated with this organization. Click new to add one.				

Child Organizations

ID	Name	Address	Contact Person	Contact Phone	Active
There are currently no child organizations associated with this organization. Click new to add one.					

Favored Requesters

ID	Name	Address
There are currently no favored requesters associated with this organization. Click new to add one.		

Associated Addresses

ID	Street	City	State	Zip	Alternate	Primary
709	4102 Pinion Drive Ste 4000	USAF Academy	CO	80840	No	<input checked="" type="radio"/>

Phone Numbers

ID	Phone	Comment	Active	Primary
There are currently no phone numbers on record for this organization. Click new to add one.				

Adding Organization to Requester Favorites (4 of 7)

4. Enter organization search criteria
5. Click on the **Search** button

Tuesday, June 29, 2004 [Logoff](#)

User Admin

Current Admin:
Dave Matthews
NBDC NATTC
PENSACOLA [7299]

Organizations
Application Users
Queue Users

[User Search](#)
[Add User](#)

Requester Search

Choose one of the following options:

A. Search for a Person (search for another person, or add a new one*)

Name (First, Last. An '*' may be used as a wildcard.)

System ID (the identification number created by this system for the person)

FMP-SSN (an external identifier for the person)

☒ Include Patient Records
☒ Include Non-Patient Records

B. Search for an Organization (search for another organization, or add a new one*)

Name (All or part of the name of the organization. An '*' may be used as a wildcard.)

DMIS Code (the external identifier for the organization)

Adding Organization to Requester Favorites

(5 of 7)

6. Click on the radio button that corresponds to the organization you added
7. Click on the **Select** button

Tuesday, June 29, 2004 [Logoff](#)

User Admin

Current Admin:
Dave Matthews
NBDC NATTC
PENSACOLA [7299]

Organizations
Application Users
Queue Users

[User Search](#)
[Add User](#)

Requester Search Results

Search Results		
ID	Name	Address
<input checked="" type="radio"/> 1117	Law Offices of Joe Gibbs	1411 Jefferson Davis, Arlington, VA 20220

[Select](#)

Other options:
[Adjust your search criteria and try again.](#)
[Create a new requester as a person.](#)
[Create a new requester as an organization.](#)

Adding Organization to Requester Favorites (6 of 7)

- The organization that you added now appears in your requester favorites

Contact People [New](#)

ID	Name	Phone	Address	Primary
There are currently no contact people associated with this organization. Click new to add one.				

Child Organizations [New](#)

ID	Name	Address	Contact Person	Contact Phone	Active
There are currently no child organizations associated with this organization. Click new to add one.					

Favored Requesters [Add](#)

ID	Name	Address	
<u>1117</u>	Law Offices of Joe Gibbs	1411 Jefferson Davis, Arlington, VA 20220	remove

Associated Addresses [New](#)

ID	Street	City	State	Zip	Alternate	Primary
<u>567</u>	BLDG 3911 760 East Avenue Ste B	Pensacola	FL	32508	No	<input checked="" type="radio"/>

Phone Numbers [New](#)

ID	Phone	Comment	Active	Primary
There are currently no phone numbers on record for this organization. Click new to add one.				

Adding Organization to Requester Favorites (7 of 7)

- When logging in as a Regular User, the organization you added will appear in the requester drop-down box for your organization

Tuesday, June 29, 2004 [Patient Search](#) [Logoff](#)

[Patient](#) [User](#) [Requests](#) [Requester](#)

Current Requester:
None

Requester Search

Choose one of the following options:

A. Select a Third-Party Organization (a third-party requester, such as a law enforcement agency or insurance company)

Law Offices of Joe Gibbs, 1411 Jefferson Davis, Arlington, VA 20220

B. Search for a Person (search for another person, or add a new one*)

Name (First, Last. An * may be used as a wildcard.)

System ID (the identification number created by this system for the person)

FMP-SSN (an external identifier for the person)

☒ Include Patient Records
☒ Include Non-Patient Records

C. Search for an Organization (search for another organization, or add a new one*)

Name (All or part of the name of the organization. An * may be used as a wildcard.)

DMIS Code (the external identifier for the organization)

* You must search for an existing requester or requesting organization before adding a new one.

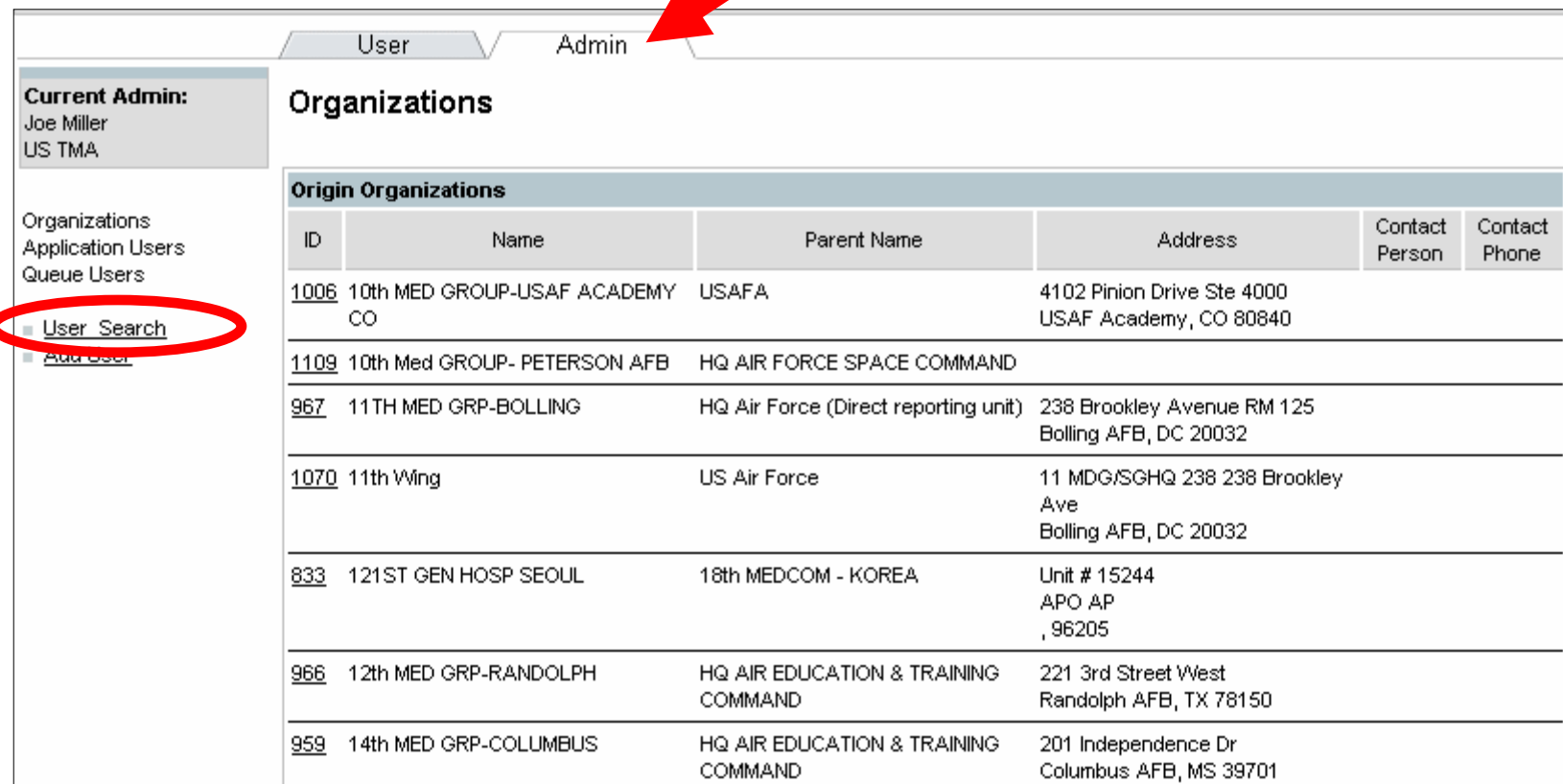
Disabling Users (1 of 5)

- If a user transfers to another facility or separates from the Service, the User Admin needs to disable that individual's ability to access the tool
- You cannot delete users from the system
 - Future auditing
 - Disclosures tracking
 - Users are attached to records they created

User Admin Functionality

Disabling Users (2 of 5)

1. Select the **Admin Tab**
2. Select the **User Search** hyperlink



The screenshot displays the 'User Admin' interface. At the top, there are two tabs: 'User' and 'Admin'. A red arrow points to the 'Admin' tab, indicating it should be selected. On the left sidebar, under 'Current Admin: Joe Miller, US TMA', there is a list of links: 'Organizations', 'Application Users', 'Queue Users', 'User Search', and 'Add User'. The 'User Search' link is circled in red, indicating it should be selected. The main content area is titled 'Organizations' and contains a table of 'Origin Organizations'.

ID	Name	Parent Name	Address	Contact Person	Contact Phone
1006	10th MED GROUP-USAF ACADEMY CO	USAF A	4102 Pinion Drive Ste 4000 USAF Academy, CO 80840		
1109	10th Med GROUP- PETERSON AFB	HQ AIR FORCE SPACE COMMAND			
967	11TH MED GRP-BOLLING	HQ Air Force (Direct reporting unit)	238 Brookley Avenue RM 125 Bolling AFB, DC 20032		
1070	11th WIng	US Air Force	11 MDG/SGHQ 238 238 Brookley Ave Bolling AFB, DC 20032		
833	121ST GEN HOSP SEOUL	18th MEDCOM - KOREA	Unit # 15244 APO AP , 96205		
966	12th MED GRP-RANDOLPH	HQ AIR EDUCATION & TRAINING COMMAND	221 3rd Street West Randolph AFB, TX 78150		
959	14th MED GRP-COLUMBUS	HQ AIR EDUCATION & TRAINING COMMAND	201 Independence Dr Columbus AFB, MS 39701		

User Admin Functionality

Disabling Users (3 of 5)

3. Enter search criteria
4. Click on the **Search** button

The screenshot shows a web application interface for user administration. At the top, there are two tabs: "User" and "Admin". Below the tabs, on the left, is a sidebar with the following content:

- Current Admin:** Joe Miller, US TMA
- Organizations
- Application Users
- Queue Users
- [User Search](#)
- [Add User](#)

The main content area is titled "User Search". It contains the following fields:

- Name (First, Last):** Two text input fields. The first field contains "Joe" and the second field contains "Smith".
- System ID (the identifier created by this system for the person):** A single text input field.

Below the input fields is a "Search" button. A red arrow points to this button. The entire "User Search" section, including the input fields and the button, is enclosed in a red rectangular box.

At the bottom of the page, there is a footer with the text: "Copyright © HIPAA Accelerator, Inc. 2000-2003, ALL RIGHTS RESERVED" and "Version: 2.2".

User Admin Functionality

Disabling Users (4 of 5)

5. Click on the radio button next to the user to be disabled
6. Click on the **Select** button

The screenshot shows a web application interface for user administration. At the top, there are two tabs: "User" and "Admin". On the left side, there is a sidebar with the following text: "Current Admin: Joe Miller, US TMA", "Organizations", "Application Users", "Queue Users", and a list of links: "User Search" and "Add User". The main content area is titled "User Search" and contains a "Search Results" table. The table has columns for "ID", "Name", "SSN", "Birth Date", and "Address". A single row is displayed with ID "64" and Name "Joe Smith". To the left of the ID "64" is a radio button. Below the table is a "Select" button. Below the button is the text "Other options: Adjust your search criteria and try again." At the bottom of the page, there is a footer with the text "Copyright © HIPAA Accelerator, Inc. 2000-2003, ALL RIGHTS RESERVED" and "Version: 2.2". Two red arrows are overlaid on the image: one points to the radio button next to the user ID 64, and the other points to the "Select" button.

ID	Name	SSN	Birth Date	Address
64	Joe Smith			

Select

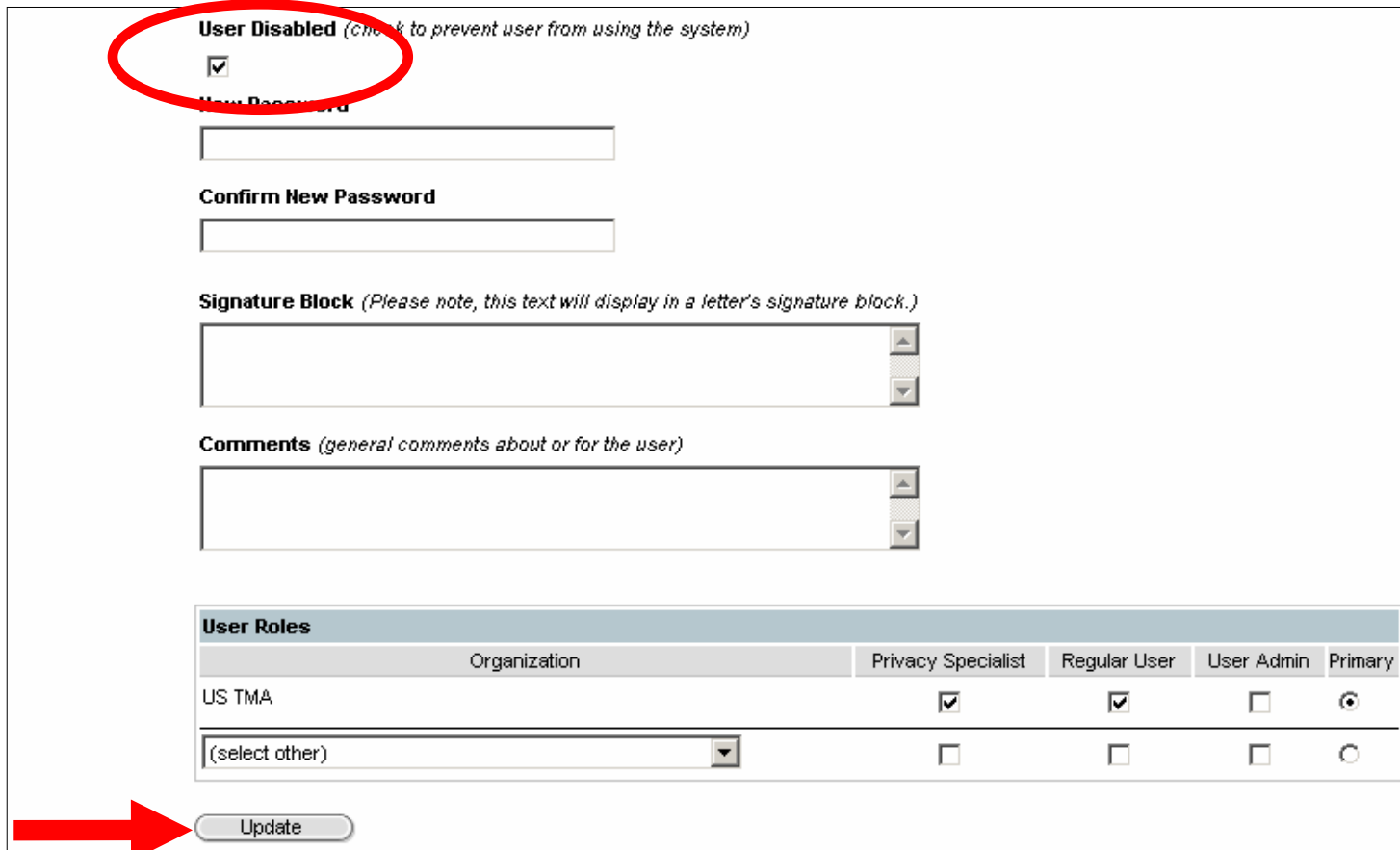
Other options:
[Adjust your search criteria and try again.](#)

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User Admin Functionality

Disabling Users (5 of 5)

7. Scroll down and place a check in the “User Disabled” box
8. Click on the [Update](#) button



User Disabled *(check to prevent user from using the system)*

☒

New Password

Confirm New Password

Signature Block *(Please note, this text will display in a letter's signature block.)*

Comments *(general comments about or for the user)*

User Roles				
Organization	Privacy Specialist	Regular User	User Admin	Primary
US TMA	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="radio"/>
(select other) <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>

Update

Transferring Users (1 of 6)

- A transfer from one MTF to another can only be executed by the User Admin at the Service level
- If a user transfers to a new organization, the User Admin at the receiving location would initiate an action for the transfer according to Service requirements
- If a User transfers from one Service to another, please contact the HIPAA Support Center at
 - Hipaasupport@tma.osd.mil
- The User Admin can only search for users within their level of the hierarchy

User Admin Functionality

Transferring Users (2 of 6)

1. Select the **Admin Tab**
2. Select the **User Search** hyperlink

Current Admin:
Joe Miller
US TMA

Organizations
Application Users
Queue Users
User Search
Add User

UserAdmin

Organizations

ID	Name	Parent Name	Address	Contact Person	Contact Phone
1006	10th MED GROUP-USAF ACADEMY CO	USAF A	4102 Pinion Drive Ste 4000 USAF Academy, CO 80840		
1109	10th Med GROUP- PETERSON AFB	HQ AIR FORCE SPACE COMMAND			
967	11TH MED GRP-BOLLING	HQ Air Force (Direct reporting unit)	238 Brookley Avenue RM 125 Bolling AFB, DC 20032		
1070	11th Wing	US Air Force	11 MDG/SGHQ 238 238 Brookley Ave Bolling AFB, DC 20032		
833	121ST GEN HOSP SEOUL	18th MEDCOM - KOREA	Unit # 15244 APO AP , 96205		
966	12th MED GRP-RANDOLPH	HQ AIR EDUCATION & TRAINING COMMAND	221 3rd Street West Randolph AFB, TX 78150		
959	14th MED GRP-COLUMBUS	HQ AIR EDUCATION & TRAINING COMMAND	201 Independence Dr Columbus AFB, MS 39701		

User Admin Functionality

Transferring Users (3 of 6)

3. Enter the search criteria
4. Click on the **Search** button

The screenshot displays a web application interface for user administration. At the top, a header bar shows the date "Friday, July 9, 2004" and a "Logoff" link. Below the header, there are two tabs: "User" and "Admin". The "User" tab is selected. On the left side, there is a sidebar with the following content: "Current Admin: Admin 3, US Primary Training Organization", "Organizations", "Application Users", "Queue Users", and two links: "User Search" and "Add User". The main content area is titled "User Search". It contains a form with three input fields: "Name (First, Last)" with "John" and "Nogan" entered, "System ID (the identifier created by this system for the person)" which is empty, and a "Search" button. A red rectangle highlights the form fields, and a red arrow points to the "Search" button. At the bottom of the page, there is a footer with the text "Copyright © HIPAA Accelerator, Inc. 2000-2003, ALL RIGHTS RESERVED" and "Version: 2.2".

Friday, July 9, 2004 [Logoff](#)

User Admin

Current Admin:
Admin 3
US Primary Training Organization

Organizations
Application Users
Queue Users

[User Search](#)
[Add User](#)

User Search

Name (First, Last)

System ID (the identifier created by this system for the person)

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User Admin Functionality

Transferring Users (4 of 6)

5. Click on the radio button for the user to be transferred
6. Click on the **Select** button

Friday, July 9, 2004 [Logoff](#)

User Admin

Current Admin:
Admin 3
US Primary Training
Organization

Organizations
Application Users
Queue Users

[User Search](#)
[Add User](#)

User Search

Search Results					
	ID	Name	SSN	Birth Date	Address
<input checked="" type="radio"/>	30	John Nogan			

[Select](#)

Other options:
[Adjust your search criteria and try again.](#)

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User Admin Functionality

Transferring Users (5 of 6)

7. Scroll down to the User Roles section
8. Select a new organization from the drop-down box and make any changes to the user role
9. Select primary radio button for the new organization
10. Click on the **Update** button

Comments (general comments about or for the user)

User Roles				
Organization	Privacy Specialist	Regular User	User Admin	Primary
US Primary Training Organization	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
US Third Training Organization	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="radio"/>

Update

Allowed Worklist Viewers [New](#)

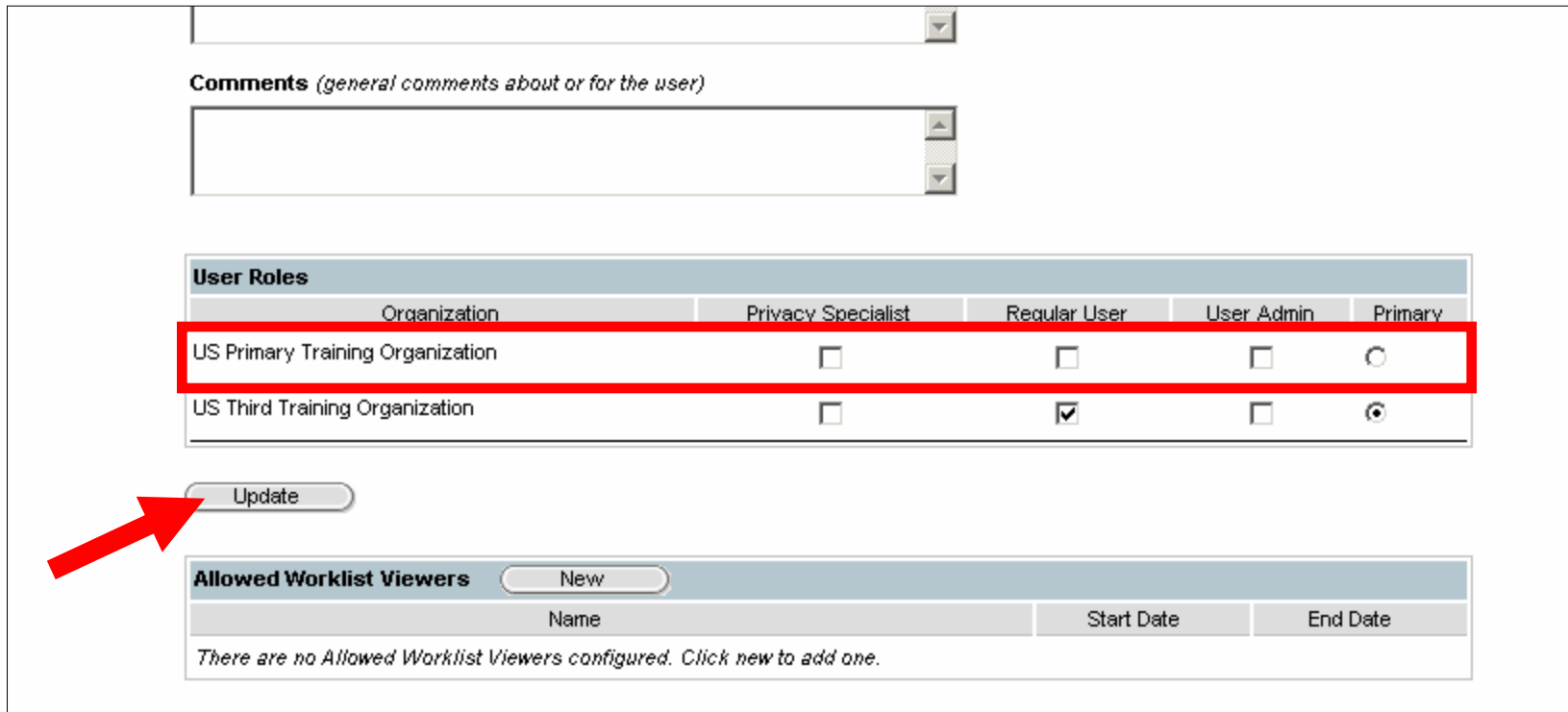
Name	Start Date	End Date
There are no Allowed Worklist Viewers configured. Click new to add one.		

User Admin Functionality

Transferring Users (6 of 6)

11. Remove the check for the old organization and role

12. Click on **Update**



Comments (general comments about or for the user)

User Roles				
Organization	Privacy Specialist	Regular User	User Admin	Primary
US Primary Training Organization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
US Third Training Organization	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="radio"/>

Update

Allowed Worklist Viewers		
Name	Start Date	End Date
There are no Allowed Worklist Viewers configured. Click new to add one.		

User Admin Functionality

Summary

- You should now be able to:
 - Describe the process of obtaining a User Admin account
 - Create user accounts
 - Setup a workflow
 - Setup a queue
 - Create requester favorites
 - Disable users
 - Transfer users

Privacy Specialist/Regular User Functionality

Privacy Specialist/Regular User Functionality

Objectives

- Upon completion of this lesson, you will be able to perform the tool functions related to:
 - Patient Records
 - Disclosures
 - Accounting of Disclosures
 - Suspending Disclosures
 - Restrictions
 - Authorizations

Patient Records

Objectives

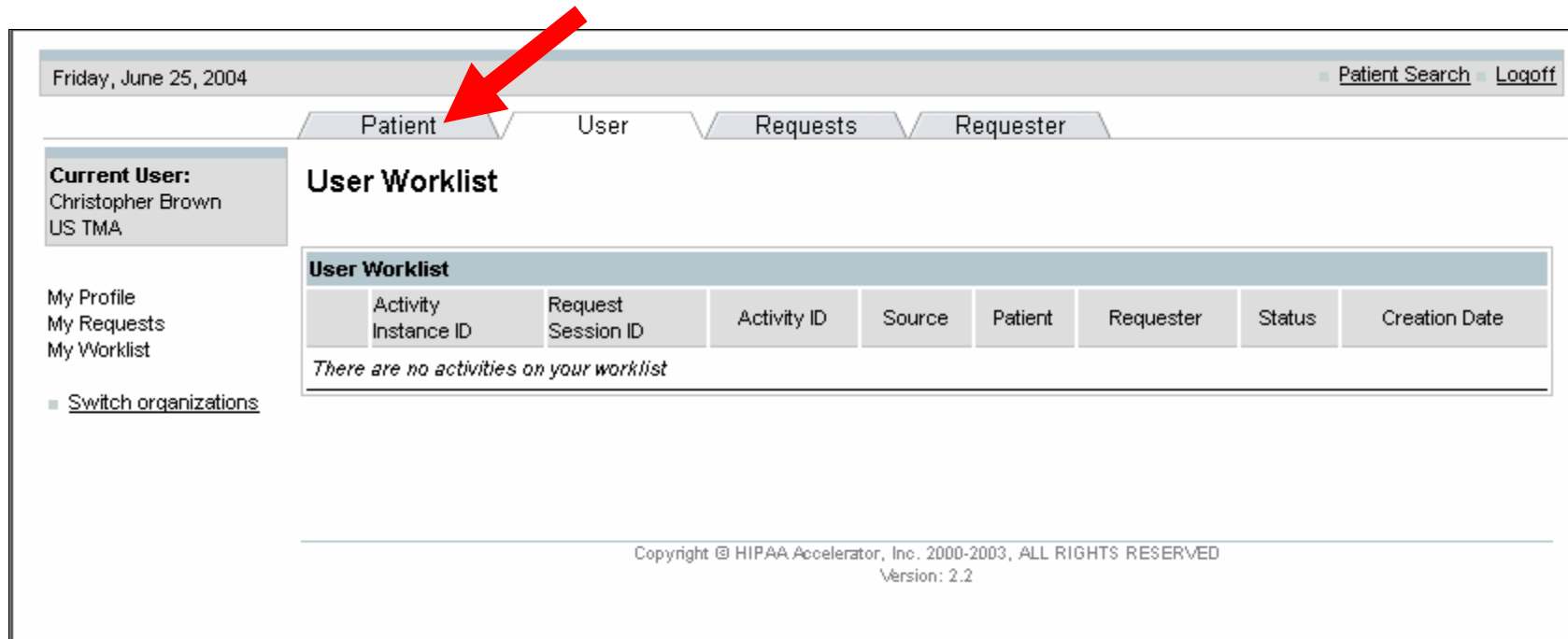
- Upon completion of this lesson, you will be able to:
 - Search for a patient record
 - Add a patient record
 - Create an alternative address
 - Create an alternative telephone number

Search for a Patient Record (1 of 4)

- The user must search for a patient record in order to:
 - Track a disclosure
 - Identify an authorization or restriction
 - Track a complaint

Search for a Patient Record (2 of 4)

1. Select the Patient Tab



Friday, June 25, 2004 [Patient Search](#) [Logoff](#)

Navigation Tabs: Patient (selected), User, Requests, Requester

Current User: Christopher Brown, US TMA

My Profile
My Requests
My Worklist

[Switch organizations](#)

User Worklist

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
There are no activities on your worklist							

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Search for a Patient Record (3 of 4)

2. Enter the patient search criteria
3. Click on the **Search** button

Friday, June 25, 2004 [Patient Search](#) [Logoff](#)

Patient User Requests Requester

Current Patient:
None

Summary
Requests
Authorization
Patient Profile
Generate Form

■ [Patient Search](#)

Patient Search

Name (First, Last)

System ID (the identifier created by this system for the person)

External ID (an external identifier for the person)

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Search for a Patient (4 of 4)

4. Search Results will display

Friday, June 25, 2004

[Patient Search](#) [Logoff](#)

Patient

User

Requests

Requester

Current Patient:
None

Patient Search Results

[Summary](#)
[Requests](#)
[Authorization](#)
[Patient Profile](#)
[Generate Form](#)

[Patient Search](#)

Search Results				
ID	Name	SSN	Birth Date	Address
<input checked="" type="radio"/> 60	Fred Thomas	111111111	1955-05-05	105 Chestnut St Chicago, IL 60600

Select

Other options:
[Adjust your search criteria and try again.](#)
[Create a new Patient record.](#)

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Version: 2.2

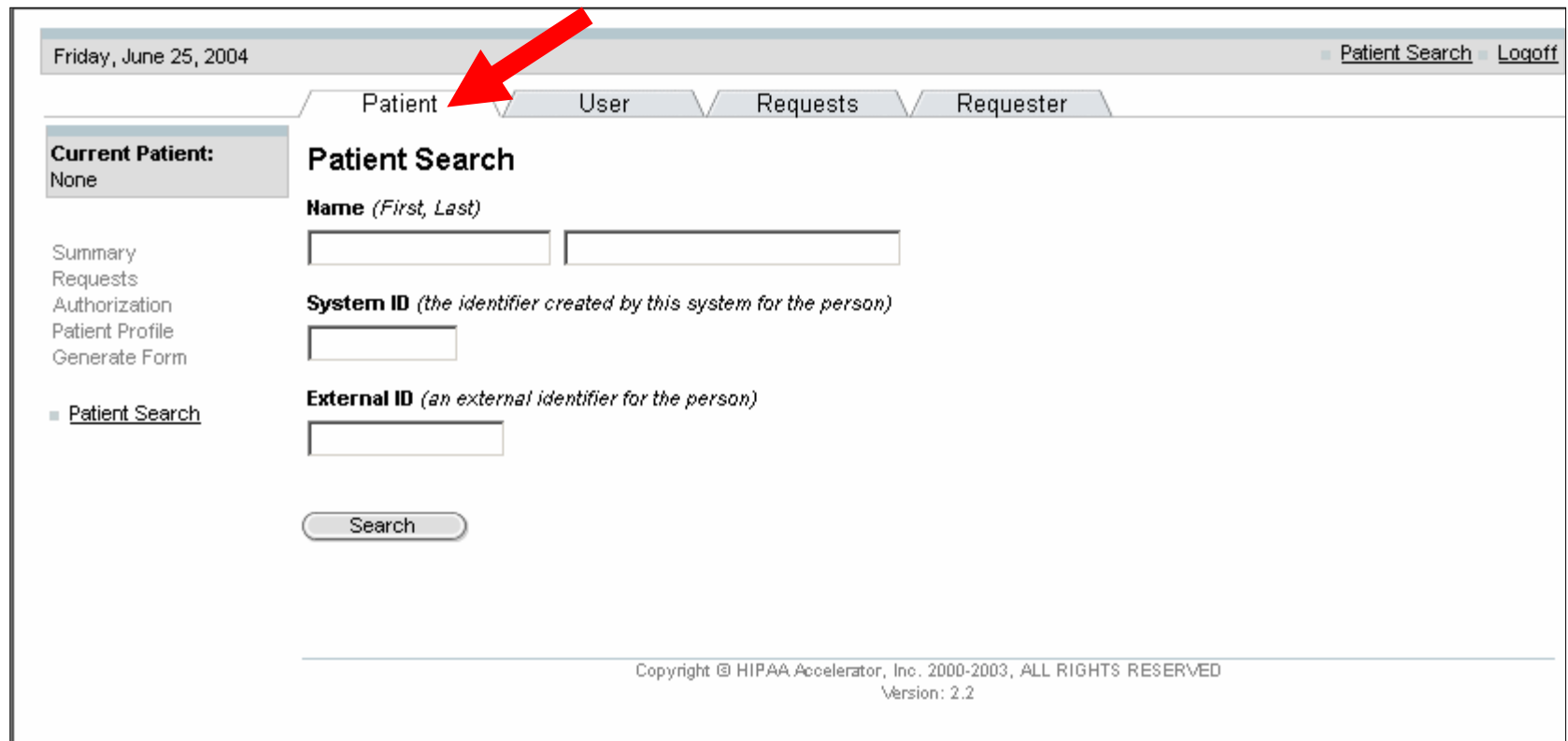
Add a Patient Record (1 of 6)

- If a patient record does not exist in the PHIMT database, then the user must add a patient record
- New patient records cannot be created without first searching the database

Patient Records

Add a Patient Record (2 of 6)

1. Select the Patient Tab



The screenshot shows a web application interface for patient records. At the top, there is a header bar with the date "Friday, June 25, 2004" on the left and links for "Patient Search" and "Logoff" on the right. Below the header is a tabbed interface with four tabs: "Patient", "User", "Requests", and "Requester". A red arrow points to the "Patient" tab, which is currently selected. To the left of the main content area is a sidebar with a section titled "Current Patient:" followed by "None". Below this are links for "Summary", "Requests", "Authorization", "Patient Profile", and "Generate Form". At the bottom of the sidebar is a link for "Patient Search". The main content area is titled "Patient Search" and contains three input fields: "Name (First, Last)" (split into two boxes), "System ID (the identifier created by this system for the person)", and "External ID (an external identifier for the person)". A "Search" button is located below these fields. At the bottom of the page, there is a footer with the text "Copyright © HIPAA Accelerator, Inc. 2000-2003, ALL RIGHTS RESERVED" and "Version: 2.2".

Friday, June 25, 2004 [Patient Search](#) [Logoff](#)

Patient User Requests Requester

Current Patient:
None

Summary
Requests
Authorization
Patient Profile
Generate Form

■ [Patient Search](#)

Patient Search

Name (First, Last)

System ID (the identifier created by this system for the person)

External ID (an external identifier for the person)

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Version: 2.2

Add a Patient Record (3 of 6)

2. Enter the patient search criteria
3. Click on the **Search** button

Friday, June 25, 2004 Patient Search Logoff

Patient User Requests Requester

Current Patient:
None

Summary
Requests
Authorization
Patient Profile
Generate Form

Patient Search

Name (First, Last)

System ID (the identifier created by this system for the person)

External ID (an external identifier for the person)

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Add a Patient Record (4 of 6)

4. If no results matched your search, select the [Create a New Patient Record](#) hyperlink

Friday, June 25, 2004 Patient Search Logoff

Patient User Requests Requester

Current Patient:
None

Summary
Requests
Authorization
Patient Profile
Generate Form

Patient Search Results

Search Results

ID	Name	SSN	Birth Date	Address
There were no results that matched your search criteria.				

Other options:
[Adjust your search criteria and try again.](#)
[Create a new Patient record.](#)

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Patient Records

Add a Patient Record (5 of 6)

5. Enter Patient Information: (name, type, SSN, birth date, email, FMP-SSSN)
6. Click on the **Save** button

Current Patient:
None

Person Details

Name (First, Middle, Last, Sr/Jr.)
David Rogers

Type
Patient

SSN (in ###-##-#### format, enter '000-00-0000' if not known)
555 - 55 - 5555

System ID (the identifier created by this system for the person)
0

Birth Date (birth date in MM/DD/YYYY format)
03 / 16 / 1968

Email (example: johnf@yahoo.com)
drogers@tma.osd.mil

FMP-SSSN (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))
55 - 555 - 55 - 5555

Alternate Communication Instructions (special instructions to send correspondence to the person)

Comments (general comments about or for the person)

Save

Patient Records

Add a Patient Record (6 of 6)

7. Enter Address Details: USA or International format
8. Click on the **Save** button

Current Patient: None

Summary
Requests
Authorization
Patient Profile
Generate Form

Address Details

Address Format (APO and FPO address should use USA format)
USA ☒ International ☐

Address Line 1 (the primary address line)

Address Line 2 (normally a suite or apartment)

City (city name, or APO or FPO)

State (two character state identifier: IL, MN, CO, etc., or AA, AE, AP for APO/FPO)

Postal Code (USA: ##### - ####)
 -

Timezone (specific timezone for the address)

Comments (general comments about or for the address)

Save

Current Patient: None

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

Address Details

Address Format (APO and FPO address should use USA format)
USA ☐ International ☒

Country (country name)

International Address Line 1

International Address Line 2

International Address Line 3

Comments (general comments about or for the address)

Save

Create an Alternative Address (1 of 12)

- A covered entity shall permit individuals to request and shall accommodate reasonable requests by individuals to receive communications of protected health information from the covered health care provider by alternative means or at alternative locations
 - DoD 6025.18-R C10.2.2
 - 164.522
- An alternative address can only be created by a Privacy Specialist

Create an Alternative Address (2 of 12)

1. Select the Patient Tab

Friday, June 25, 2004 [Patient Search](#) [Logoff](#)

Patient User Requests Requester

Current User:
Christopher Brown
US TMA

My Profile
My Requests
My Worklist

[Switch organizations](#)

User Worklist

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
There are no activities on your worklist							

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Version: 2.2

Create an Alternative Address (3 of 12)

2. Enter the patient search criteria
3. Click on the **Search** button

The screenshot shows a web application interface for patient records. At the top, there is a date "Friday, June 25, 2004" and links for "Patient Search" and "Logoff". Below this is a navigation bar with tabs for "Patient", "User", "Requests", and "Requester". On the left side, there is a sidebar with a "Current Patient: None" section and a list of links: "Summary", "Requests", "Authorization", "Patient Profile", "Generate Form", and "Patient Search". A red arrow points to the "Patient Search" link. The main content area is titled "Patient Search" and contains three input fields: "Name (First, Last)" with "Fred" and "Thomas" entered, "System ID (the identifier created by this system for the person)" which is empty, and "External ID (an external identifier for the person)" which is empty. A red box highlights these three input fields. Below the input fields is a "Search" button, with a red arrow pointing to it. At the bottom of the page, there is a copyright notice: "Copyright © HIPAA Accelerator, Inc. 2000-2003, ALL RIGHTS RESERVED" and "Version: 2.2".

Friday, June 25, 2004 [Patient Search](#) [Logoff](#)

Patient User Requests Requester

Current Patient:
None

Summary
Requests
Authorization
Patient Profile
Generate Form

[Patient Search](#)

Patient Search

Name (First, Last)

System ID (the identifier created by this system for the person)

External ID (an external identifier for the person)

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Create an Alternative Address (4 of 12)

4. Search Results will display
5. Select the patient

Friday, June 25, 2004 [Patient Search](#) [Logoff](#)

Patient User Requests Requester

Current Patient:
None

Patient Search Results

Summary
Requests
Authorization
Patient Profile
Generate Form

Search Results

ID	Name	SSN	Birth Date	Address
60	Fred Thomas	111111111	1955-05-05	105 Chestnut St Chicago, IL 60600

Other options:
[Adjust your search criteria and try again.](#)
[Create a new Patient record.](#)

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Create an Alternative Address (5 of 12)

6. Select the **Patient Profile** hyperlink

The screenshot displays a web application interface for patient records. At the top, a header bar shows the date "Friday, June 25, 2004" and links for "Patient Search" and "Logoff". Below the header, a navigation menu contains tabs for "Patient", "User", "Admin", "Requests", and "Requester". On the left side, a sidebar lists various options: "Current Patient: Fred Thomas 05/05/1955", "Summary", "Requests", "Record Disclosure", "Accounting Suspensions", "Disclosure Restrictions", "Authorization", "Patient Profile", and "Patient Search". The "Patient Profile" option is circled in red. The main content area is titled "Summary" and features a "Summary Item Filters" section with a "Display" button and checkboxes for "All", "Disclosures", "Suspensions", "Restrictions", "Reports", "Letters", "Authorizations", and "Complaints". At the bottom, a footer contains the copyright notice "Copyright © HIPAA Accelerator, Inc. 2000-2003, ALL RIGHTS RESERVED" and the version number "Version: 2.2".

Friday, June 25, 2004 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
Fred Thomas
05/05/1955

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile
[Patient Search](#)

Summary

Summary Item Filters [Display](#)

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☐ Authorizations ☐ Complaints

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Version: 2.2

Create an Alternative Address (6 of 12)

7. Scroll down to the Associated Addresses box and click on the **Alternative Communication** button

Alternate Communication Instructions *(special instructions to send correspondence to the person)*

Comments *(general comments about or for the person)*

Associated Addresses

ID	Street	City	State	Zip	Alternate	Primary
<u>1046</u>	105 Chestnut St	Chicago	IL	60600	No	<input checked="" type="radio"/>

Phone Numbers

ID	Phone	Comment	Active	Primary
There are currently no phone numbers on record for this person. Click new to add one.				

Patient Records

Create an Alternative Address (7 of 12)

8. Enter the Address Details: USA or International format
9. Put a check in the Alternate box

Monday, June 28, 2004 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
Fred Thomas
05/05/1955

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

[Patient Search](#)

Patient Profile \ Address Details

Address Format (APO and FPO address should use USA format)
USA ☒ International ☐

Address Line 1 (the primary address line)

Address Line 2 (normally a suite or apartment)

City (city name, or APO or FPO)

State (two character state identifier: IL, MN, CO, etc., or AA, AE, AP for APO/FPO)

Postal Code (USA: ##### - ####)
 -

Timezone (specific timezone for the address)

Comments (general comments about or for the address)

Alternate (Is this an alternate address? All communications will be sent to this address if checked.)
☒

Create an Alternative Address (8 of 12)

10. Select **Approved** or **Denied** from the Outcome drop-down box

Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

☐ Patient Search

1234 Deer Lane

Address Line 2 (normally a suite or apartment)

City (city name, or APO or FPO)

Ashburn

State (two character state identifier: IL, MN, CO, etc., or AA,AE,AP for APO/FPO)

VA

Postal Code (USA: ##### - ####)

22345 -

Timezone (specific timezone for the address)

Eastern

Comments (general comments about or for the address)

Alternate (Is this an alternate address? All communications will be sent to this address if checked.)

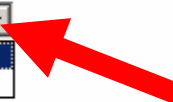
☒

Outcome (Indicate whether request for alternate address is approved or denied)

Approved

Approved

Denied



Create an Alternative Address (9 of 12)

11. Once the outcome is selected, click on the **Save** button

Patient Search

City (city name, or APO or FPO)
Ashburn

State (two character state identifier: IL, MN, CO, etc., or AA,AE,AP for APO/FPO)
VA

Postal Code (USA: ##### - ####)
22345 -


Timezone (specific timezone for the address)
Eastern

Comments (general comments about or for the address)

Alternate (Is this an alternate address? All communications will be sent to this address if checked.)
☒

Outcome (indicate whether request for alternate address is approved or denied)
Approved

Save



Create an Alternative Address (10 of 12)

12. Enter an appropriate comment in the Alternate Communication Instructions text box
13. Click on the **Update** button

Email (example: johnn@yahoo.com)

Alternate Communication Instructions (special instructions to send correspondence to the person)

Comments (general comments about or for the person)

Associated Addresses

ID	Street	City	State	Zip	Alternate	Primary
1077	1234 Deer Ln.	Ashburn	VA	22345	Yes	<input checked="" type="radio"/>
1046	105 Chestnut St	Chicago	IL	60600	No	<input type="radio"/>

Patient Records

Create an Alternative Address (11 of 12)

13. Scroll to the bottom of the Patient Profile screen to view the added alternative address

Email (example: johnn@yahoo.com)

Alternate Communication Instructions (special instructions to send correspondence to the person)

Comments (general comments about or for the person)

Associated Addresses

ID	Street	City	State	Zip	Alternate	Primary
1076	1234 Deer Ln.	Ashburn	VA	22345	Yes	<input checked="" type="radio"/>
1046	105 Chestnut St	Chicago	IL	60600	No	<input type="radio"/>

Phone Numbers

ID	Phone	Comment	Active	Primary
There are currently no phone numbers on record for this person. Click new to add one.				

Create an Alternative Address (12 of 12)

- After an alternative address has been recorded, a note will appear on the Patient Summary Screen

The screenshot displays the 'Patient Summary' screen for Fred Thomas (DOB: 05/05/1955). The interface includes a top navigation bar with 'Patient Search' and 'Logoff' links. Below this is a tabbed menu with 'Patient', 'User', 'Requests', and 'Requester'. The 'Patient' tab is active, showing the 'Summary' section. A red circle highlights the text 'An alternate address exists for this patient' in the summary area. To the left of the summary is a sidebar with links: 'Current Patient: Fred Thomas 05/05/1955', 'Summary', 'Requests', 'Authorization', 'Patient Profile', and 'Generate Form'. Below the sidebar is a 'Patient Search' link. The 'Summary Item Filters' section includes a 'Display' button and checkboxes for 'All', 'Disclosures', 'Reports', 'Letters', and 'Authorizations'. The footer contains copyright information: 'Copyright © HIPAA Accelerator, Inc. 2000-2003, ALL RIGHTS RESERVED' and 'Version: 2.2'.

Monday, June 28, 2004 [Patient Search](#) [Logoff](#)

Patient User Requests Requester

Current Patient:
Fred Thomas
05/05/1955

Summary
An alternate address exists for this patient

Summary
Requests
Authorization
Patient Profile
Generate Form

[Patient Search](#)

Summary Item Filters [Display](#)

☐ All ☐ Disclosures ☐ Reports ☐ Letters ☐ Authorizations

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Version: 2.2

Create an Alternative Telephone Number (1 of 4)

- Individuals have the right to request an alternative telephone number for receiving communications related to their PHI
- An alternative telephone number can be created by Regular Users and Privacy Specialists

Create an Alternative Telephone Number (2 of 4)

1. Scroll to the bottom of the Patient Details screen
2. Click on the **New** button next to Phone Numbers

Comments *(general comments about or for the person)*

Associated Addresses

ID	Street	City	State	Zip	Alternate	Primary
<u>1077</u>	1234 Deer Ln.	Ashburn	VA	22345	Yes	<input checked="" type="radio"/>
<u>1046</u>	105 Chestnut St	Chicago	IL	60600	No	<input type="radio"/>

Phone Numbers

ID	Phone	Comment	Active	Primary
There are currently no phone numbers on record for this person. Click new to add one.				

Create an Alternative Telephone Number (3 of 4)

3. The Phone Number Details screen will display (choose USA or International format)
4. Type in the phone number and enter any comments
5. Click on the **Save** button

Monday, June 28, 2004

Patient User Requests Requester

Current Patient:
Fred Thomas
05/05/1955

Phone Number Details

Phone Format
USA ☒ International ☐

Phone Number (area code, phone number, and extension if applicable)
(555) 123 - 4567 ext. 222

Comments (general comments about or for the phone)
This is a cell phone number with voice mail.

☒ **Active** (Is this an active phone? Inactive phones are going to be removed from display and

Save

Friday, July 9, 2004

Patient User Requests Requester

Current Patient:
Fred Thomas
05/05/1955

Phone Number Details

Phone Format
USA ☐ International ☒

Phone Number (enter country-code, area code and phone number together, followed by
123-4567 ext. 222

Comments (general comments about or for the phone)
This is a cell phone number with voice mail.

☒ **Active** (Is this an active phone? Inactive phones are going to be removed from display and

Update

Create an Alternative Telephone Number (4 of 4)

6. The phone number you added will appear on the Patient Details screen

Comments *(general comments about or for the person)*

Associated Addresses

ID	Street	City	State	Zip	Alternate	Primary
1077	1234 Deer Ln.	Ashburn	VA	22345	Yes	<input checked="" type="radio"/>
1046	105 Chestnut St	Chicago	IL	60600	No	<input type="radio"/>

Phone Numbers

ID	Phone	Comment	Active	Primary
10	(555) 123-4567 x222	This is a cell phone number with voice mail.	Yes	<input checked="" type="radio"/>

Patient Records

Summary

- You should now be able to:
 - Search for a patient record
 - Add a patient record
 - Create an alternative address
 - Create an alternative telephone number

Disclosures

Objectives

- Upon completion of this lesson, you will be able to:
 - Record a request for disclosure as a Regular User
 - Record a disclosure as a Privacy Specialist
 - Approve/deny a disclosure
 - Amend a disclosure

Recording a Request for Disclosure (1 of 12)

- Individuals have the right to an accounting of disclosures
- DoD 6025.18-R requires us to record specific information
- Chapter 13 pertains to the Accounting of Disclosures Policy
- Regular Users record requests for disclosures and route them to their Privacy Specialist for approval or denial

Disclosures

Recording a Request for Disclosure (2 of 12)

1. Select the **Requests Tab**
2. Click on the **Disclosure** Radio Button
3. Click on the **Next** button

The screenshot shows a web application interface for recording a request. At the top, a header bar displays the date 'Friday, July 2, 2004' on the left and 'Patient Search' and 'Logoff' links on the right. Below the header is a navigation bar with four tabs: 'Patient', 'User', 'Requests', and 'Requester'. A red arrow points to the 'Requests' tab. The main content area is titled 'Create New Request'. On the left, a box labeled 'Current Request:' shows 'None'. Below this are two links: 'Create New Request' and 'Search for a Request'. The main section is titled 'Select Request Type' and contains two radio buttons: 'Disclosure' (which is selected) and 'Disclosure Accounting'. A red arrow points to the 'Disclosure' radio button. At the bottom of the form is a 'Next' button, with a red arrow pointing to it.

Disclosures

Recording a Request for Disclosure (3 of 12)

4. Enter patient search criteria
5. Click on the **Search** button

Friday, July 2, 2004 [Patient Search](#) [Logoff](#)

Patient User Requests Requester

Current Request:
Disclosure

■ Create New Request
■ Search for a Request

Patient Search

Name (First, Last)

System ID (the identifier created by this system for the person)

External ID (an external identifier for the person)

Disclosures

Recording a Request for Disclosure (4 of 12)

6. Select the radio button next to the patient's name
7. Click on the **Select** button

Friday, July 2, 2004 [Patient Search](#) [Logoff](#)

Patient / User / Requests / Requester

Current Request:
Disclosure

[Create New Request](#)
[Search for a Request](#)

Patient Search Results

Search Results

ID	Name	SSN	Birth Date	Address
<input checked="" type="radio"/> 60	Fred Thomas	111111111	1955-05-05	1234 Deer Ln. Ashburn, VA 22345

Other options:
[Adjust your search criteria and try again.](#)
[Create a new Patient record.](#)

Recording a Request for Disclosure (5 of 12)

- If the request is being made by the patient themselves,
8. Click on the **Select** button next to the patient's name

Friday, July 2, 2004 [Patient Search](#) [Logout](#)

Patient / **User** / **Requests** / **Requester**

Current Request:
Disclosure

☐ Create New Request
☐ Search for a Request

Select Patient (1) **Select Requester (2)** Request Details (3) Disclosure Details (4) Request Action (5)

Requester Search

Choose one of the following options:

A. Select the Patient (the request is being made by the Patient themselves)

Fred Thomas

B. Select a Third-Party Organization (a third-party requester, such as a law enforcement agency or insurance company)

Law Offices of Joe Gibbs, 1411 Jefferson Davis, Arlington, VA 20220

C. Search for a Person (search for another person, or add a new one*)

Name (First, Last. An "*" may be used as a wildcard.)

System ID (the identification number created by this system for the person)

FMP-SSN (an external identifier for the person)

☒ Include Patient Records
☒ Include Non-Patient Records

D. Search for an Organization (search for another organization, or add a new one*)

Name (All or part of the name of the organization. An "*" may be used as a wildcard.)

Disclosures

Recording a Request for Disclosure (6 of 12)

9. Confirm Requester and Recipient Details

10. Click on the **Next** button

Friday, July 2, 2004 [Patient Search](#) [Logout](#)

Current Request:
Disclosure


[Create New Request](#)
[Search for a Request](#)

Confirm Requester and Recipient Details

Patient: Fred Thomas
Date of Birth: 1955-05-05
SSN: 111111111
Address: 1234 Deer Ln., Ashburn, VA 22345

Requester: Fred Thomas [change](#)
Address: [Add New](#)

Recipient: [Same as requester](#)
[set a different recipient](#)



Recording a Request for Disclosure (7 of 12)

11. Enter in the Request Details: (details of the request, identity verification, and authority verification)

Thursday, July 8, 2004 [Patient Search](#) [Logoff](#)

Current Request:
Disclosure

Requester

Select Patient (1) Select Requester (2) **Request Details (3)** Disclosure Details (4) Request Action (5)

☐ Create New Request
☐ Search for a Request

Request Details

Details of the Request (requester's comments, or instructions about this request)

Requester Identity Verified (was the requester's identity verified?)

Patient Identifier

Description of Requester Identity Verification (if the requester's identity was verified, how was it verified?)

license

Requester Authority Verified (was the requester's authority to access information verified?)

Patient is Requester

Description of Requester Authority Verification (if the requester's authority was verified, how was it verified?)

patient is requester

Information Start Date (the start date for the information in MM/DD/YYYY format)

Information End Date (the end date for the information in MM/DD/YYYY format)

Disclosures

Recording a Request for Disclosure (8 of 12)

12. Scroll down the screen and enter: (Information start and end date, request format, and request classification)
13. Click on the **Next** button

Requester Identity Verified *(was the requester's identity verified?)*
Patient Identifier

Description of Requester Identity Verification *(if the requester's identity was verified, how was it verified?)*
license

Requester Authority Verified *(was the requester's authority to access information verified?)*
Patient is Requester

Description of Requester Authority Verification *(if the requester's authority was verified, how was it verified?)*
patient is requester

Information Start Date *(the start date for the information in MM/DD/YYYY format)*
06/03/2004

Information End Date *(the end date for the information in MM/DD/YYYY format)*
07/08/2004

Request Format *(the format in which this request has been received)*
Received Request in Writing

Request Classification *(an optional classification for this request)*
Undefined

Back Next

Disclosures

Recording a Request for Disclosure (9 of 12)

13. Enter in the Disclosure Details: (Disclosure type, status, disclosure date, treatment start and end date, origin organization, disclosure purpose)

Thursday, July 8, 2004 [Patient Search](#) [Logoff](#)

Patient User Requests Requester

Current Request: Disclosure

Select Patient Select Requester Request Details **Disclosure Details** Request Action

① ② ③ ④ ⑤

Create New Request
Search for a Request

Disclosure Details

Disclosure Type (the type of disclosure)
Law Enforcement Purposes

Disclosure Status (the status of the disclosure)
Pending

Disclosure Date (the disclosure date in MM/DD/YYYY format)
07/08/2004

Treatment Start Date (the service start date in MM/DD/YYYY format)
06/29/2004

Treatment End Date (the service end date in MM/DD/YYYY format)
07/08/2004

Origin Organization (where the disclosure originated)
1st MED GRP-LANGLEY

Disclosure Purpose (the purpose of the disclosure)
Law Enforcement

Disclosures

Recording a Request for Disclosure (10 of 12)

14. Scroll down the screen and enter: (PHI description and disclosure comments)

15. Click on the **Next** button

Disclosure Purpose *(the purpose of the disclosure)*

Law Enforcement

Other:

Protected Health Information Description *(the description of the Protected Health Information disclosed)*

☒ Complete Health Record(s)

☐ Consultation Report(s)

☐ Discharge Summary

☐ History and Physical Examination

☐ Laboratory Test(s)

☐ Operative Report(s)

☐ Pathology Report(s)

☐ Progress Notes

Other:

Disclosure Comments *(the INTERNAL comments for this disclosure - these do NOT show up in the Protected Health Information disclosure report)*

Back Next

Recording a Request for Disclosure (11 of 12)

16. Enter in the Request Action Details
17. From the Action drop-down box, select the appropriate routing option (Privacy Specialist)
18. Click on the **Save** button

Current Request:
Disclosure

Create New Request
Search for a Request

Request Action

Patient
Name: Fred Thomas
SSN #: 111111111
Birth Date: 05-05-1955
Address: 1234 Deer Ln., Ashburn, VA 22345

Requester/Recipient
Name: Fred Thomas
Address: 1234 Deer Ln., Ashburn, VA 22345

Details of the Request (requester's comments about the scope of this request)

Approved Part (for partially approved requests, describe part of request that was approved)

Denied Part (for partially denied requests, describe part of request that was denied)

Action (action for this request)
Route to Privacy Specialist

Back Save

Recording a Request for Disclosure (12 of 12)

19. The Disclosure Request Summary will display

Thursday, July 8, 2004

[Patient Search](#) [Logoff](#)

Patient

User

Requests

Requester

Current Request:
Disclosure

Summary
History
Documents
Request Details
Disclosure Details
Request Action

☐ Create New Request
☐ Search for a Request

Request Summary

Patient
Name: Fred Thomas
SSN #: 111111111
Birth Date: 05-05-1955
Address: 1234 Deer Ln., Ashburn, VA 22345

Requester/Recipient
Name: Fred Thomas
Address: 1234 Deer Ln., Ashburn, VA 22345

Request Status: Routed for Approval

Other Request Details	
Description	Details
Request Type	Disclosure
Details of the Request	
Disclosure Type	Type: Law Enforcement Purposes, ID: 54, Date: 07/08/2004
Start Date	06/03/2004
End Date	07/08/2004
PHI Items	Complete Health Record(s)
Authority Verified	Patient is Requester
Verify Authority Text	patient is requester
Identity Verified	Patient Identifier
Verify Identity Text	license
Route to Privacy Specialist	Yes
Request Classification	Undefined

Disclosures

Approving/Denying a Disclosure (1 of 4)

- Once a Regular User routes a request for disclosure to the Privacy Specialist, the request will display in the Privacy Specialist's work list
- The Privacy Specialist will then approve or deny the request

Disclosures

Approving/Denying a Disclosure (2 of 4)

1. Select the **User** tab
2. Select **My Worklist** hyperlink
3. Select the **Edit** hyperlink for the disclosure that the Privacy Specialist will approve or deny

Thursday, July 8, 2004 [Patient Search](#) [Logoff](#)

User | Patient | Admin | Requests | Requester

Current User:
John Nogan1
US Primary Training
Organization

My Profile
My Requests
My Worklist
[Switch organization](#)

User Worklist

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
edit 73	69	Request Approval (Disclosure)		Fred Thomas	Fred Thomas	Action Pending	07/08/2004
edit 72	68	Acknowledge Completed Request & Print Documents (Public Records)		Jane Doe	Jane Doe	Action Pending	07/07/2004

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Disclosures

Approving/Denying a Disclosure (3 of 4)

4. Select **Approved** or **Denied** from the Activity Status drop-down box
5. Click on the **Update** button

Patient
Name: Fred Thomas
SSN # 111111111
Birth Date: 05-05-1955
Address: 1234 Deer Ln., Ashburn, VA 22345

Requester/Recipient
Name: Fred Thomas
Address: 1234 Deer Ln., Ashburn, VA 22345

Instructions
Request Approval (Disclosure)

Activity Status (new activity status code)
Approved
Action Pending
Approved
Denied
Cancelled
Route to Privacy Specialist
Route to Other User

Denied Part (for partially approved requests, describe part of request that was denied)

Route Completed Request to Originator (route to the request creator for acknowledgement & document preparation)
☐

Comments (enter details about this activity)

Update

Disclosures

Approving/Denying a Disclosure (4 of 4)

- The approved/denied request will display in the Request Activity History box

Thursday, July 8, 2004

Patient SearchLogoff

Patient

User

Admin

Requests

Requester

Current Request:
Disclosure

Summary
History
Documents
Request Details
Disclosure Details
Request Action

Create New Request

Search for a Request

Edit Request

Request Activity History

Activity Instance ID	Request Session ID	Activity ID	Source	Patient Id	Requester Id	User	Status	Creation Date
73	69	Request Approval (Disclosure)		Fred Thomas	Fred Thomas	John Nogan1	Approved	07/08/2004

Request Session Details

Edit

Description	Details
Request Type	Disclosure
Details of the Request	
Disclosure Type	Type: Law Enforcement Purposes, ID: 54, Date: 07/08/2004
Start Date	06/03/2004
End Date	07/08/2004
PHI Items	Complete Health Record(s)
Authority Verified	Patient is Requester
Verify Authority Text	patient is requester
Identity Verified	Patient Identifier
Verify Identity Text	license
Route to Privacy Specialist	Yes
Request Classification	Undefined
Request Format	Received Request in Writing

Recording a Disclosure (1 of 8)

- Privacy Specialists have the ability to record and approve disclosures in one step
- This eliminates the two step process of recording the request, routing it to their work list, and then approving it

Disclosures

Recording a Disclosure (2 of 8)

1. Select the **Patient** tab
2. Enter patient search criteria
3. Click on the **Search** button

The screenshot shows a web application interface for recording a disclosure. At the top, there is a header bar with the date "Thursday, July 8, 2004" on the left and links for "Patient Search" and "Logoff" on the right. Below the header is a navigation bar with tabs: "Patient", "User", "Admin", "Requests", and "Requester". The "Patient" tab is selected, indicated by a red arrow. On the left side, there is a sidebar menu with options: "Current Patient: None", "Summary", "Requests", "Record Disclosure", "Accounting Suspensions", "Disclosure Restrictions", "Authorization", and "Patient Profile". The "Patient Search" section is highlighted in the sidebar. The main content area is titled "Patient Search" and contains a form with three input fields: "Name (First, Last)" with "Jane" and "Doe" entered, "System ID (the identifier created by this system for the person)" which is empty, and "External ID (an external identifier for the person)" which is empty. A red box highlights the entire form area. At the bottom of the form is a "Search" button, which is pointed to by a red arrow.

Thursday, July 8, 2004 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
None

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

[Patient Search](#)

Patient Search

Name (First, Last)

System ID (the identifier created by this system for the person)

External ID (an external identifier for the person)

Disclosures

Recording a Disclosure (3 of 8)

4. Click on the radio button for the appropriate patient
5. Click on the **Select** button

Thursday, July 8, 2004 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
None

Patient Search Results

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

[Patient Search](#)

Search Results

ID	Name	SSN	Birth Date	Address
<input checked="" type="radio"/> 39	Jane Doe	123456789	1980-01-01	99 Maple St Boston, MA 22323

FMP-SSSN 01-565765768 (2004-07-07 to 2004-07-07)

Select

Other options:
[Adjust your search criteria and try again.](#)
[Create a new Patient record.](#)

Disclosures

Recording a Disclosure (4 of 8)

6. Select the [Record Disclosure](#) hyperlink

Thursday, July 8, 2004 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
Jane Doe
01/01/1980
FMP-SSSN:01-
565765768

Summary

A restriction of disclosures exists for this patient.
An alternate address exists for this patient.

Summary Item Filters [Display](#)

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☐ Authorizations ☐ Complaints

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

[Patient Search](#)

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Disclosures

Recording a Disclosure (5 of 8)

- Record the disclosure details: (requester, authority, form, date, recipient, disclosure type)
- Select the Disclosure Status from the drop-down box

The screenshot shows a web application interface for recording a disclosure. The top navigation bar includes a date 'Thursday, July 8, 2004' and links for 'Patient Search' and 'Logoff'. Below this is a tabbed interface with 'Patient', 'User', 'Admin', 'Requests', and 'Requester' tabs. The 'Current Patient' sidebar on the left lists 'Jane Doe' with her birth date and FMP-SSSN, and a menu with options like 'Summary', 'Requests', 'Record Disclosure', 'Accounting Suspensions', 'Disclosure Restrictions', 'Authorization', and 'Patient Profile'. The main 'Record Disclosure' form contains several sections: 'Requester' (with a 'Change' button), 'Requester Authority' (a dropdown menu), 'Request Form' (a dropdown menu), 'Request Date' (a date field), 'Recipient' (with a 'Change' button), 'Disclosure Type' (a dropdown menu), and 'Disclosure Status' (a dropdown menu). A red rectangular box highlights the 'Requester', 'Requester Authority', 'Request Form', 'Request Date', 'Recipient', and 'Disclosure Type' sections. A red arrow points from a grey callout box to the 'Change' button next to the 'Requester' section. Another red arrow points to the 'Disclosure Status' dropdown menu, which is currently open and shows options: 'Undefined', 'Cancelled', 'Complete', 'Pending', and 'Undefined'.

Thursday, July 8, 2004 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
Jane Doe
01/01/1980
FMP-SSSN:01-565765768

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

■ [Patient Search](#)

Record Disclosure

Requester (the organization or person requesting the disclosure) [Change](#)

Name: Jane Doe
Address: 99 Maple St, Boston, MA 22323
Phone:
Contact Person:

Requester Authority (the authority of the requester)
Patient is Requester

Request Form (the form of the disclosure request)
Received Request in Writing

Request Date (the disclosure request date in MM/DD/YYYY format)
07/08/2004

Recipient (the organization or person where the disclosure went) [Change](#)

Name: Jane Doe
Address: 99 Maple St, Boston, MA 22323
Phone:
Contact Person:

Disclosure Type (the type of disclosure)
Law Enforcement Purposes

Disclosure Status (the status of the disclosure)
Undefined
Cancelled
Complete
Pending
Undefined

Click on the Change button to change requester or recipient

Disclosures

Recording a Disclosure (6 of 8)

9. Scroll down the screen and enter: (treatment start and end date, origin organization, disclosure purpose, and description)

Complete

Disclosure Date (the disclosure date in MM/DD/YYYY format)
07/07/2004

Treatment Start Date (the treatment or service start date in MM/DD/YYYY format)
06/27/2004

Treatment End Date (the treatment or service end date in MM/DD/YYYY format)
07/08/2004

Treatment Identifier (the treatment or service identifier)

Origin Organization (where the disclosure originated)
US Primary Training Organization

Disclosure Purpose (the purpose of the disclosure)
Law Enforcement

Other:

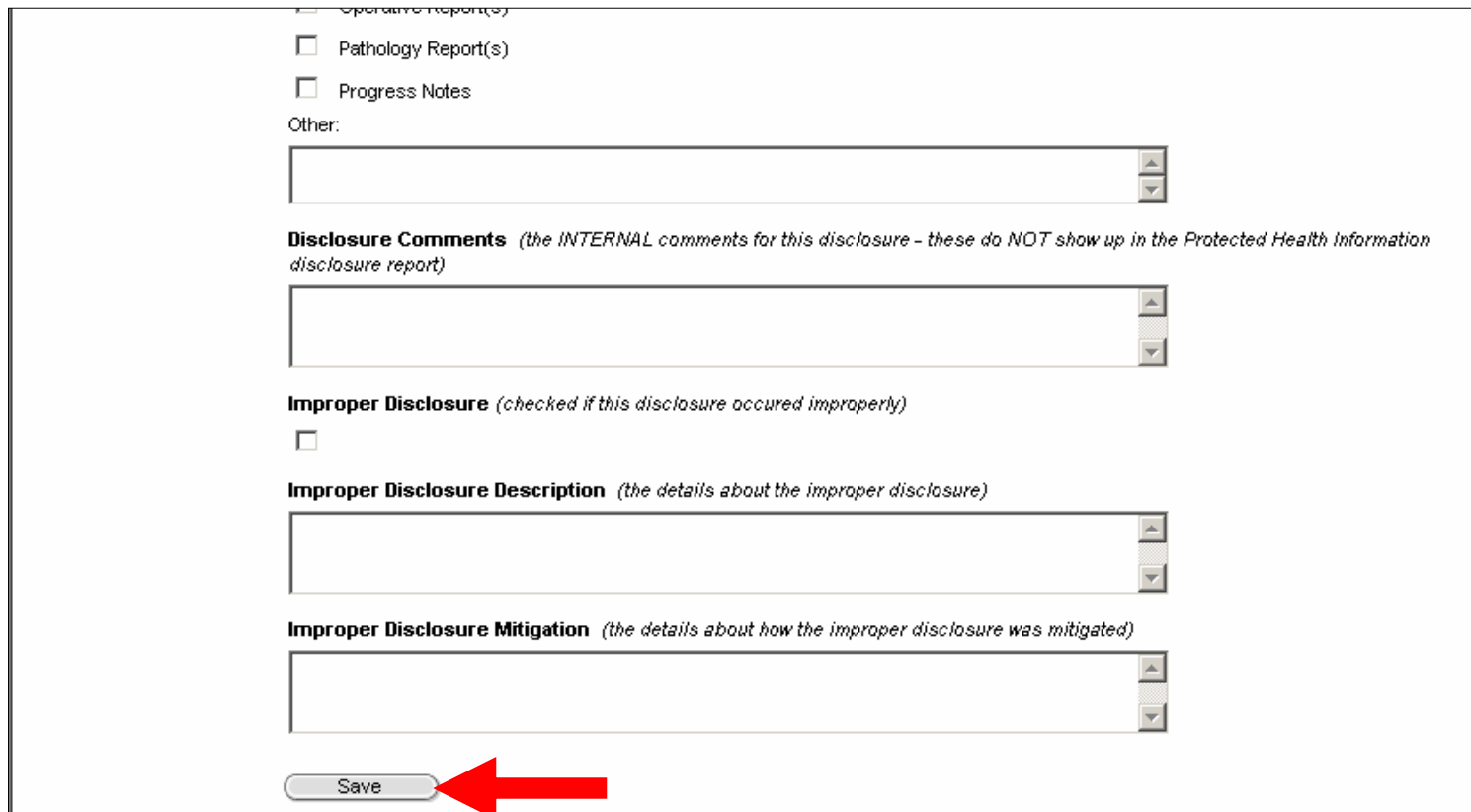
Protected Health Information Description (the description of the Protected Health Information disclosed)

☒ Complete Health Record(s)
☐ Consultation Report(s)
☐ Discharge Summary
☐ History and Physical Examination
☐ Laboratory Test(s)
☐ Operative Report(s)
☐ Pathology Report(s)
☐ Progress Notes

Disclosures

Recording a Disclosure (7 of 8)

10. Scroll down to the bottom of the screen and click on the **Save** button



The screenshot shows a web form for recording a disclosure. It includes several sections with checkboxes and text input fields:

- ☐ Operative Report(s)
- ☐ Pathology Report(s)
- ☐ Progress Notes
- Other:
- Disclosure Comments** *(the INTERNAL comments for this disclosure - these do NOT show up in the Protected Health Information disclosure report)*
- Improper Disclosure** *(checked if this disclosure occurred improperly)*
☐
- Improper Disclosure Description** *(the details about the improper disclosure)*
- Improper Disclosure Mitigation** *(the details about how the improper disclosure was mitigated)*
- Save** button (indicated by a red arrow)

Disclosures

Recording a Disclosure (8 of 8)

- The disclosure is now complete and only the disclosure comments and improper disclosure fields can be updated

Thursday, July 8, 2004 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
Jane Doe
01/01/1980
FMP-SSSN: 01-
565765768

Record Disclosure

The status of this disclosure is complete, only the disclosure comments and improper disclosure fields can be updated.

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

[Patient Search](#)

Requester *(the organization or person requesting the disclosure)*
Name: Jane Doe
Address: 99 Maple St, Boston, MA 22323
Phone:
Contact Person:

Requester Authority *(the authority of the requester)*
Patient is Requester

Request Form *(the form of the disclosure request)*
Received Request in Writing

Request Date *(the disclosure request date in MM/DD/YYYY format)*
07/08/2004

Recipient *(the organization or person where the disclosure went)*
Name: Jane Doe
Address: 99 Maple St, Boston, MA 22323
Phone:
Contact Person:

Disclosure Type *(the type of disclosure)*
Law Enforcement Purposes

Disclosure Status *(the status of the disclosure)*
Complete

Disclosure Date *(the disclosure date in MM/DD/YYYY format)*
07/07/2004

Amending Disclosures (1 of 5)

- As a Privacy Specialist you are authorized to label a disclosure as Improper
- Once a Disclosure status is marked as completed, it can only be amended by marking it as an Improper Disclosure
 - The disclosure was made incorrectly

Disclosures

Amending Disclosures (2 of 5)

1. Select the **Patient** tab
2. Search for and select the patient

Thursday, July 8, 2004 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
Fred Thomas
05/05/1955

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

[Patient Search](#)

Patient Search Results

ID	Name	SSN	Birth Date	Address
60	Fred Thomas	111111111	1955-05-05	1234 Deer Ln. Ashburn, VA 22345

Select

Other options:
[Adjust your search criteria and try again.](#)
[Create a new Patient record.](#)

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Disclosures

Amending Disclosures (2 of 5)

- Place a check in the Disclosures box and click on the **Display** button

Thursday, July 8, 2004 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
Fred Thomas
05/05/1955

Summary
An alternate address exists for this patient.

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

Summary Item Filters [Display](#)

☐ All ☒ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☐ Authorizations ☐ Complaints

[Patient Search](#)

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Disclosures

Amending Disclosures (3 of 5)

3. Select the **ID** hyperlink for the disclosure that you want to amend

36	07/09/2004	As Required by Law	US Primary Training Organization	FBI	Complete Health Record(s)	Workers Comp	Pending
39	07/09/2004	Avert Serious Threats to Health or Safety	US Primary Training Organization	Disability Determination Services	Complete Health Record(s)	Attorney	Pending
47	07/09/2004	Judicial and Administrative Proceedings	US Primary Training Organization	Tennessee Dept. of Health	Complete Health Record(s)	Law Enforcement	Pending
48	07/09/2004	Judicial and Administrative Proceedings	US Primary Training Organization	Tennessee Dept. of Health	Complete Health Record(s)	Law Enforcement	Complete
32	07/09/2004	About Decedents	US Primary Training Organization	FBI	Complete Health Record(s)	Subpoena	Pending
22	07/09/2004	Inmates in Correctional Institutions or in Custody	US Primary Training Organization	Department of Veterans Affairs	Complete Health Record(s)	Medical	Pending
42	07/09/2004	Cadaver Organ, Eye, or Tissue Donation Purposes	US Primary Training Organization	Disability Determination Services	Complete Health Record(s)	Audit	Pending
54	07/08/2004	Law Enforcement Purposes	1st MED GRP-LANGLEY	Fred Thomas	Complete Health Record(s)	Law Enforcement	Complete
34	07/06/2004	As Required by Law	US Primary Training Organization	FBI	Complete Health Record(s)	Workers Comp	Pending
2	07/07/2004	Law Enforcement Purposes	NBDC NATTC PENSACOLA	Fred Thomas	Complete Health Record(s)	Attorney	Pending
1	07/01/2004	Other	US TMA	Fred Thomas	Complete Health Record(s)	Medical	Pending

Disclosures

Amending Disclosures (4 of 5)

4. The Record Disclosure screen will display

Thursday, July 8, 2004 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
Fred Thomas
05/05/1955

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

■ [Patient Search](#)

Record Disclosure

The status of this disclosure is complete, only the disclosure comments and improper disclosure fields can be updated.

Requester *(the organization or person requesting the disclosure)*
Name: Fred Thomas
Address: 1234 Deer Ln., Ashburn, VA 22345
Phone: (555) 123-4567 x222
Contact Person:

Requester Authority *(the authority of the requester)*
Undefined

Request Form *(the form of the disclosure request)*
Received Request in Writing

Request Date *(the disclosure request date in MM/DD/YYYY format)*

Recipient *(the organization or person where the disclosure went)*
Name: Fred Thomas
Address: 1234 Deer Ln., Ashburn, VA 22345
Phone:
Contact Person:

Disclosure Type *(the type of disclosure)*
Law Enforcement Purposes

Disclosure Status *(the status of the disclosure)*
Complete

Disclosures

Amending Disclosures (5 of 5)

5. Scroll to the bottom of the screen and place a check in the **Improper Disclosure** checkbox
6. Enter a description of the Improper Disclosure and mitigation
7. Click on the **Update** button

Other:

Disclosure Comments *(the INTERNAL comments for this disclosure – these do NOT show up in the Protected Health Information disclosure report)*

Improper Disclosure *(checked if this disclosure occurred improperly)*

☒

Improper Disclosure Description *(the details about the improper disclosure)*

sent to wrong address

Improper Disclosure Mitigation *(the details about how the improper disclosure was mitigated)*

Privacy Officer spoke with patient

Update

Disclosures

Summary

- You should now be able to:
 - Record a request for disclosure as a Regular User
 - Record a disclosure as a Privacy Specialist
 - Approve/deny the disclosure
 - Amend a disclosure

Accounting of Disclosures

Accounting of Disclosures

Objectives

- Once you have completed this lesson, you will be able to:
 - Record a request for an accounting of disclosures
 - Approve/deny a request for an accounting of disclosures
 - Generate an accounting of disclosures report

Recording a Request (1 of 9)

- An individual has a right to receive an accounting of disclosures of protected health information made by a covered entity in the 6 years prior to the date that the accounting is requested
 - DoD 6025.18-R Chapter 13
- Regular Users and Privacy Specialists can record a request for an accounting of disclosures
- Only Privacy Specialists can approve or deny the request

Accounting of Disclosures

Recording a Request (2 of 9)

1. Select the **Requests** Tab
2. Select **Create New Request** hyperlink and/or click on the radio button for **Disclosure Accounting**
3. Click on the **Next** button

The screenshot shows a web application interface with a header bar displaying the date "Thursday, July 1, 2004" and links for "Patient Search" and "Logoff". Below the header is a navigation menu with tabs for "Patient", "User", "Admin", "Requests", and "Requester". A red arrow points to the "Requests" tab. On the left side, there is a box labeled "Current Request: None". The main content area is titled "Create New Request" and contains a section "Select Request Type" with three radio button options: "Complaint", "Disclosure", and "Disclosure Accounting". The "Create New Request" link is circled in red, and a red arrow points to the "Disclosure Accounting" radio button. At the bottom, the "Next" button is also circled in red.

Accounting of Disclosures

Recording a Request (3 of 9)

4. Search for or select the patient
5. Click on the **OK** button

Thursday, July 1, 2004 Patient Search Logoff

Patient **User** **Admin** **Requests** **Requester**

Current Request:
Disclosure Accounting

Select Patient **Select Requester** **Request Details** **Request Action**

1 2 3 4

☐ Create New Request
☐ Search for a Request

Patient Search

Use the current person:

Name: Fred Thomas
SSN #: 111111111
Birth Date: 05-05-1955
Address: 1234 Deer Ln., Ashburn, VA 22345

OK

- or -

Search for another person:

Name (First, Last)

System ID (the identifier created by this system for the person)

External ID (an external identifier for the person)

Search

Accounting of Disclosures

Recording a Request (4 of 9)

6. Select the requester (patient is requesting an accounting of disclosures)

Thursday, July 1, 2004 Patient Search Logoff

Patient **User** **Admin** **Requests** **Requester**

Current Request:
Disclosure Accounting

☐ Create New Request
☐ Search for a Request

Select Patient **Select Requester** Request Details Request Action

① ② ③ ④

Requester Search

Choose one of the following options:

A. Select the Patient *(the request is being made by the Patient themselves)*

B. Select a Third-Party Organization *(a third-party requester, such as a law enforcement agency or insurance company)*

C. Search for a Person *(search for another person, or add a new one*)*

Name *(First, Last. An "*" may be used as a wildcard.)*

System ID *(the identification number created by this system for the person)*

FMP-SSN *(an external identifier for the person)*

☒ Include Patient Records
☒ Include Non-Patient Records

Accounting of Disclosures

Recording a Request (5 of 9)

7. Confirm requester and recipient details (patient is requester)
8. Click on the **Next** button

Thursday, July 8, 2004 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Request:
Disclosure Accounting

Select Patient Select Requester Request Details Request Action

1 2 3 4

■ Create New Request
■ Search for a Request


Confirm Requester and Recipient Details

Patient: Fred Thomas
Date of Birth: 1955-05-05
SSN: 111111111
Address: 1234 Deer Ln., Ashburn, VA 22345

Requester: Fred Thomas [change](#)
Address: 1234 Deer Ln., Ashburn, VA 22345 [Add New](#)

Recipient: [Same as requester](#)
[set a different recipient](#)

[Back](#) [Next](#)



Accounting of Disclosures

Recording a Request (6 of 9)

9. Enter the Request Details: (details of the request, identity verification, authority verification)

Thursday, July 8, 2004 [Patient Search](#) [Logoff](#)

Patient **User** **Admin** **Requests** **Requester**

Current Request:
Disclosure Accounting

Select Patient (1) Select Requester (2) **Request Details (3)** Request Action (4)

☐ Create New Request
☐ Search for a Request

Request Details

Details of the Request (*requester's comments, or instructions about this request*)

patient is requesting an accounting of disclosures

Requester Identity Verified (*was the requester's identity verified?*)

Social Security Number

Description of Requester Identity Verification (*if the requester's identity was verified, how was it verified?*)

military ID

Requester Authority Verified (*was the requester's authority to access information verified?*)

Patient is Requester

Description of Requester Authority Verification (*if the requester's authority was verified, how was it verified?*)

patient is requester

Accounting of Disclosures

Recording a Request (7 of 9)

10. Scroll down the screen and enter: (Information start and end date, request format, and request classification)
11. Click on the **Next** button

patient is requesting an accounting of disclosures

Requester Identity Verified (was the requester's identity verified?)
Social Security Number

Description of Requester Identity Verification (if the requester's identity was verified, how was it verified?)
military ID

Requester Authority Verified (was the requester's authority to access information verified?)
Patient is Requester

Description of Requester Authority Verification (if the requester's authority was verified, how was it verified?)
patient is requester

Information Start Date (the start date for the information in MM/DD/YYYY format)
04/14/2003

Information End Date (the end date for the information in MM/DD/YYYY format)
07/08/2004

Request Format (the format in which this request has been received)
Received Request in Writing

Request Classification (an optional classification for this request)
Attorney

Back Next

Accounting of Disclosures

Recording a Request (8 of 9)

12. Enter in the Request Action details
13. From the Action drop-down box, select the appropriate person to route the request to
14. Click on the **Save** button

Thursday, July 8, 2004 Patient Search Logout

Current Request: Disclosure Accounting

Request Action

Patient
Name: Fred Thomas
SSN #: 111111111
Birth Date: 05-05-1955
Address: 1234 Deer Ln., Ashburn, VA 22345

Requester/Recipient
Name: Fred Thomas
Address: 1234 Deer Ln., Ashburn, VA 22345

Details of the Request (requester's comments about the scope of this request)
patient is requesting an accounting of disclosures

Approved Part (for partially approved requests, describe part of request that was approved)

Denied Part (for partially denied requests, describe part of request that was denied)

Action (action for this request)
Route to My Worklist

Accounting of Disclosures

Recording a Request (9 of 9)

- The Request Summary screen will display

Thursday, July 8, 2004 [Patient Search](#) [Logoff](#)

[Patient](#) [User](#) [Admin](#) [Requests](#) [Requester](#)

Current Request:
Disclosure Accounting

Summary
History
Documents
Request Details
Request Action

☐ Create New Request
☐ Search for a Request

Request Summary

Patient
Name: Fred Thomas
SSN #: 111111111
Birth Date: 05-05-1955
Address: 1234 Deer Ln., Ashburn, VA 22345

Requester/Recipient
Name: Fred Thomas
Address: 1234 Deer Ln., Ashburn, VA 22345

Request Status: Routed Request For Acceptance

Other Request Details	
Description	Details
Request Type	Disclosure Accounting
Details of the Request	patient is requesting an accounting of disclosures
Start Date	04/14/2003
End Date	07/08/2004
Authority Verified	Patient is Requester
Verify Authority Text	patient is requester
Identity Verified	Social Security Number
Verify Identity Text	military ID
Request Classification	Attorney
Request Format	Received Request in Writing

Approving/Denying a Request (1 of 4)

- Once a request for an accounting of disclosures has been recorded, a Privacy Specialist must approve or deny the request
- Once routed, the request will display in the Privacy Specialist's work list

Accounting of Disclosures

Approving/Denying a Request (2 of 4)

1. Select the **User** tab
2. Select **My Worklist** hyperlink
3. Select the **Edit** hyperlink for that disclosure accounting that you will approve or deny

Thursday, July 8, 2004 [Patient Search](#) [Logoff](#)

[Patient](#) **[User](#)** [Admin](#) [Requests](#) [Requester](#)

Current User:
John Nogan1
US Primary Training
Organization

[My Profile](#)
[My Requests](#)
[My Worklist](#)
[Switch organization](#)

User Worklist

	Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
edit	7	71	Request Acceptance (Disclosure Accounting)		Fred Thomas	Fred Thomas	Action Pending	07/08/2004
edit	72	68	Acknowledge Completed Request & Print Documents (Public Records)		Jane Doe	Jane Doe	Action Pending	07/07/2004

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Accounting of Disclosures

Approving/Denying a Request (3 of 4)

- The Edit Activity Details screen will display
4. Select **Accepted** or **Denied** from the Activity Status drop-down box
 5. Click on the **Update** button

Thursday, July 8, 2004

Patient Search Logoff

Patient User Admin Requests Requester

Current Request:
Disclosure Accounting

Edit Activity Details

Patient
Name: Fred Thomas
SSN #: 111111111
Birth Date: 05-05-1955
Address: 1234 Deer Ln., Ashburn, VA 22345

Requester/Recipient
Name: Fred Thomas
Address: 1234 Deer Ln., Ashburn, VA 22345

Instructions
Request Acceptance (Disclosure Accounting)

Activity Status (new activity status code)
Accepted
Action Pending
Accepted
Denied
Cancelled
Route to Privacy Specialist
Route to Other User
Denied Part (for partially approved requests, describe part of request that was denied)

Comments (enter details about this activity)

Update

Accounting of Disclosures

Approving/Denying a Request (4 of 4)

- The Disclosure Accounting Request screen will display with the approved accounting of disclosures

Thursday, July 8, 2004 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Request:
Disclosure Accounting

Disclosure Accounting Request

Summary
History
Documents
Request Details
Request Action

☐ Create New Request
☐ Search for a Request

Reportable Disclosures *(checked disclosures will be included in the disclosure accounting report, suspended disclosures are highlighted in red)*

Include	Disclosure ID	Date	Type	Origin	Receiving Entity	PHI	Purpose	Status
<input checked="" type="checkbox"/>	3	07/10/2004	About Decedents	US Primary Training Organization	Fred Thomas	Complete Health Record(s)	Attorney	Complete
<input checked="" type="checkbox"/>	48	07/09/2004	Judicial and Administrative Proceedings	US Primary Training Organization	Tennessee Dept. of Health	Complete Health Record(s)	Law Enforcement	Complete
<input type="checkbox"/>	54	07/08/2004	Law Enforcement Purposes	1st MED GRP-LANGLEY	Fred Thomas	Complete Health Record(s)	Law Enforcement	Complete

Disclosures Accounting Suspensions

Suspension ID	Suspended Disclosure	Identifier	Start Date	End Date	Comments
4	The specific disclosure of type Law Enforcement Purposes that occurred on 07/08/2004 with a disclosure ID of 54		07/08/2004	07/08/2004	

Create

Generating an Accounting of Disclosures Report (1 of 4)

- An accounting of disclosures report is a summary of all of the disclosures made for a particular patient
 - Pending disclosures will not display in the report
- Once a request has been approved, an accounting of disclosures report can be generated
- The Privacy Specialist has the option to route the report back to the originator

Generating an Accounting of Disclosures Report (2 of 4)

1. From the Disclosure Accounting Request screen, click on the **Create** button to generate the report

Thursday, July 8, 2004 [Patient Search](#) [Logoff](#)

[Patient](#) [User](#) [Admin](#) [Requests](#) [Requester](#)

Current Request:
Disclosure Accounting

Summary
History
Documents
Request Details
Request Action

[Create New Request](#)
[Search for a Request](#)


Disclosure Accounting Request

Reportable Disclosures (checked disclosures will be included in the disclosure accounting report, suspended disclosures are highlighted in red)

Include	Disclosure ID	Date	Type	Origin	Receiving Entity	PHI	Purpose	Status
<input checked="" type="checkbox"/>	3	07/10/2004	About Decedents	US Primary Training Organization	Fred Thomas	Complete Health Record(s)	Attorney	Complete
<input checked="" type="checkbox"/>	48	07/09/2004	Judicial and Administrative Proceedings	US Primary Training Organization	Tennessee Dept. of Health	Complete Health Record(s)	Law Enforcement	Complete
<input type="checkbox"/>	54	07/08/2004	Law Enforcement Purposes	1st MED GRP-LANGLEY	Fred Thomas	Complete Health Record(s)	Law Enforcement	Complete

Disclosures Accounting Suspensions

Suspension ID	Suspended Disclosure	Identifier	Start Date	End Date	Comments
4	The specific disclosure of type Law Enforcement Purposes that occurred on 07/08/2004 with a disclosure ID of 54		07/08/2004	07/08/2004	

 [Create](#)

Generating an Accounting of Disclosures Report (3 of 4)

2. Select the [Protected Health Information Disclosure Report](#) hyperlink to create the report
3. If you want to route the completed request back to the originator, place a check in the box and click on [Confirm](#)

Disclosure Accounting Request

Disclosure Report (click on the link below to view or print the document)

[Protected Health Information Disclosure Report](#)

Route Completed Request to Originator (route to the request creator for acknowledgement & document preparation)

☐

[Confirm](#)

■ Create New Request
■ Search for a Request

Generating an Accounting of Disclosures Report (4 of 4)

- The Accounting of Disclosures Report will display

The screenshot shows a software window titled "Protected Health Information Disclosure Report". The window has a sidebar on the left with "Bookmarks", "Thumbnails", and "Signatures". The main content area displays the report details. At the top, it says "Protected Health Information Disclosure Report", "Prepared for: Fred Thomas", "Requested from: US Primary Training Organization", and "Generated on: 07-08-2004". Below this is a table with two rows of disclosure information. The first row has a Disclosure ID of 3, Date of 2004-07-10, Disclosure Type of "About Decedents - About Decedents", Disclosure Purpose of "Attorney", Disclosed Health Information of "Complete Health Record(s)", Disclosure Originated From of "US Primary Training Organization Skyline PL, Falls Church, VA 20110", Disclosure Recipient of "Fred Thomas 1234 Deer Ln., Ashburn, VA 22345", and Disclosure Requester of "Fred Thomas 1234 Deer Ln., Ashburn, VA 22345". The second row has a Disclosure ID of 48, Date of 2004-07-09, and Disclosure Type of "Judicial and Administrative Proceedings - Judicial and Administrative Proceedings". The window also shows a status bar at the bottom with "1 of 1", "8.26 x 11.69 in", and a zoom level of "162%".

Protected Health Information Disclosure Report
Prepared for: Fred Thomas
Requested from: US Primary Training Organization
Generated on: 07-08-2004

Disclosure ID:	3
Date:	2004-07-10
Disclosure Type:	About Decedents - About Decedents
Disclosure Purpose:	Attorney
Disclosed Health Information:	Complete Health Record(s)
Disclosure Originated From:	US Primary Training Organization Skyline PL, Falls Church, VA 20110
Disclosure Recipient:	Fred Thomas 1234 Deer Ln., Ashburn, VA 22345
Disclosure Requester:	Fred Thomas 1234 Deer Ln., Ashburn, VA 22345

Disclosure ID:	48
Date:	2004-07-09
Disclosure Type:	Judicial and Administrative Proceedings - Judicial and Administrative Proceedings

Accounting of Disclosures

Summary

- You should now be able to:
 - Record a request for an accounting of disclosures
 - Approve/deny a request for an accounting of disclosures
 - Generate an accounting of disclosures report

Accounting Suspensions

Accounting Suspensions

Objectives

- Upon completion of this lesson, you will be able to:
 - Create an accounting suspension

Creating a Suspension (1 of 7)

- The covered entity shall temporarily suspend an individual's right to receive an accounting of disclosures to a health oversight agency or law enforcement official...DoD 6025.18-R C13.1.2.1
- Two types of disclosures can be suspended:
 - Law enforcement purposes
 - Health oversight activities
- Privacy Specialists have the ability to enter an accounting suspension in two ways
 - Specific disclosure
 - Type of disclosure
- Once entered, the suspension can be viewed by all users

Accounting Suspensions

Creating a Suspension (2 of 7)

1. Search for and select a patient record
2. Select the [Accounting Suspensions](#) hyperlink

Thursday, July 8, 2004 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
Jane Doe
01/01/1980
FMP-SSSN:01-
565765768

Summary
A restriction of disclosures exists for this patient.
An alternate address exists for this patient.

Summary
Requests
Record Disclosure
Accounting Suspension
Disclosure Restrictions
Authorization
Patient Profile

Summary Item Filters [Display](#)

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☐ Authorizations ☐ Complaints

[Patient Search](#)

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Version: 2.2

Accounting Suspensions

Creating a Suspension (3 of 7)

3. Select the **Specific Disclosure** hyperlink

Thursday, July 8, 2004 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
Jane Doe
01/01/1980
FMP-SSSN:01-
565765768

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

[Patient Search](#)


Accounting Suspensions

Suspension ID	Suspended Disclosure	Identifier	Start Date	End Date	Comments
2	The specific disclosure of type Health Oversight Activities that occurred on 07/07/2004 with a disclosure ID of 53		07/07/2004	07/23/2004	

Create New Accounting Suspension

For the current Patient, suspend their disclosure accounting rights for a **specific disclosure**. Use this to suspend a single disclosure.

For the current Patient, suspend their disclosure accounting rights for a **type of disclosure**. Use this to suspend more than one disclosure of a particular type.



Accounting Suspensions

Creating a Suspension (4 of 7)

- Click on the radio button for the disclosure you want to suspend
- Enter the suspension details: (requesting statement and form, justification, and start and end date)

Thursday, July 8, 2004 Patient Search Logout

Patient User Admin Requests Requester

Current Patient:
Jane Doe
01/01/1980
FMP-SSSN:01-565765768

Summary
Requests
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Disclosure Requests
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Patient Profile

[Patient Search](#)

Accounting Suspension

Patient Disclosures (Suspended disclosures are highlighted in red)

Suspend	Disclosure ID	Date	Type	Origin	Receiving Entity	PHI	Purpose	Status
<input checked="" type="radio"/>	51	07/07/2004	Law Enforcement Purposes	US Primary Training Organization	BAH Law Offices	Complete Health Record(s)	Law Enforcement	Complete
<input type="radio"/>	53	07/07/2004	Health Oversight Activities	US Primary Training Organization	Naval Hospital Great Lakes	Complete Health Record(s)	Medicare	Complete

Requesting Statement *(The agency or official statement requesting the Patient suspension. If the request is oral, this must include the identity of the agency or official making the statement)*

as requested by attorney

Form of Requesting Statement *(The form of the statement requesting suspension)*

Written ☒ Oral ☐

Justification *(mandatory comments explaining the justification for the Patient suspension)*

directed by attorney

Start Date *(The start date from which the disclosure will not be reported to the Patient in MM/DD/YYYY format)*

07/01/2004

End Date *(The end date after which time the Patient will be able to access the disclosure in MM/DD/YYYY format)*

07/08/2004

Accounting Suspensions

Creating a Suspension (5 of 7)

6. Scroll to the bottom of the screen and click the **Save** button

■ Patient Search

Requesting Statement *(The agency or official statement requesting the Patient suspension. If the request is oral, this must include the identity of the agency or official making the statement)*

as requested by attorney

Form of Requesting Statement *(The form of the statement requesting suspension)*

Written ☒ Oral ☐

Justification *(mandatory comments explaining the justification for the Patient suspension)*

directed by attorney

Start Date *(The start date from which the disclosure will not be reported to the Patient in MM/DD/YYYY format)*

07/01/2004

End Date *(The end date after which time the Patient will be able to access the disclosure in MM/DD/YYYY format)*

07/08/2004

Identifier *(The OPTIONAL identifier for the suspension, could be a case number, warrant number, subpoena ID, etc.)*

Comments *(OPTIONAL general comments about or for the Patient)*

Save

Accounting Suspensions

Creating a Suspension (6 of 7)

7. Select the **Summary** hyperlink

Thursday, July 8, 2004 [Patient Search](#) [Logout](#)


Patient User Admin Requests Requester

Current Patient:
Jane Doe
01/01/1980
FMP-SSSN: 01-565765768

Accounting Suspension

Patient Disclosures (Suspended disclosures are highlighted in red)

Suspend	Disclosure ID	Date	Type	Origin	Receiving Entity	PHI	Purpose	Status
<input checked="" type="radio"/>	51	07/07/2004	Law Enforcement Purposes	US Primary Training Organization	BAH Law Offices	Complete Health Record(s)	Law Enforcement	Complete
<input type="radio"/>	53	07/07/2004	Health Oversight Activities	US Primary Training Organization	Naval Hospital Great Lakes	Complete Health Record(s)	Medicare	Complete

Summary 
Requests
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[Patient Search](#)

Requesting Statement *(The agency or official statement requesting the Patient suspension. If the request is oral, this must include the identity of the agency or official making the statement)*

as requested by attorney

Form of Requesting Statement *(The form of the statement requesting suspension)*

Written ☒ Oral ☐

Justification *(mandatory comments explaining the justification for the Patient suspension)*

directed by attorney

Start Date *(The start date from which the disclosure will not be reported to the Patient in MM/DD/YYYY format)*

07/01/2004

End Date *(The end date after which time the Patient will be able to access the disclosure in MM/DD/YYYY format)*

07/08/2004

Accounting Suspensions

Creating a Suspension (7 of 7)

8. Check the **Suspensions** checkbox
9. Click on the **Display** button
- The Disclosure that you suspended will display in the Disclosure Accounting Suspensions section

Thursday, July 8, 2004 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
Jane Doe
01/01/1980
FMP-SSSN:01-
565765768

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[Patient Search](#)

Summary
A restriction of disclosures exists for this patient.
An alternate address exists for this patient.

Summary Item Filters [Display](#)

☐ All ☐ Disclosures ☒ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☐ Authorizations ☐ Complaints

Disclosure Accounting Suspensions

Suspension ID	Suspended Disclosure	Identifier	Start Date	End Date	Comments
3	The specific disclosure of type Law Enforcement Purposes that occurred on 07/07/2004 with a disclosure ID of 51		07/08/2004	07/29/2004	
2	The specific disclosure of type Health Oversight Activities that occurred on 07/07/2004 with a disclosure ID of 53		07/07/2004	07/23/2004	

Accounting Suspensions

Summary

- You should now be able to:
 - Create an accounting suspension

Disclosure Restrictions

Disclosure Restrictions

Objectives

- Upon completion of this lesson, you will be able to:
 - Record a disclosure restriction request
 - Approve or deny the disclosure restriction request
 - Generate an approval or denial letter to be sent to the requester

Disclosure Restrictions

Recording a Restriction (1 of 6)

- DoD 6025.18-R Chapter 10 describes the rights to request privacy protection for protected health information
 - Covered entity is not required to agree to such requests
 - Requests may be made orally or in writing, but must be documented
 - Covered entity must provide a response to the individual
- Privacy Specialists can record and approve or deny requests for disclosure restrictions
 - Once approved or denied, a letter with an explanation can be generated

Disclosure Restrictions

Recording a Restriction (2 of 6)

1. Select the **Patient** tab
2. Enter patient search criteria
3. Click on **Search**

Thursday, July 8, 2004 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
None

Summary
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Authorization
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■ [Patient Search](#)

Patient Search

Name (First, Last)

System ID *(the identifier created by this system for the person)*

External ID *(an external identifier for the person)*

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Disclosure Restrictions

Recording a Restriction (3 of 6)

4. Click on the radio button for the patient
5. Click on the **Select** button

Thursday, July 8, 2004 [Patient Search](#) [Logout](#)

Patient User Admin Requests Requester

Current Patient:
None

Patient Search Results

Summary
Requests
Record Disclosure
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Disclosure Restrictions
Authorization
Patient Profile

Search Results

	ID	Name	SSN	Birth Date	Address
<input checked="" type="radio"/>	39	Jane Doe	123456789	1980-01-01	99 Maple St Boston, MA 22323

FMP-SSSN 01-565765768 (2004-07-07 to 2004-07-07)

Other options:
[Adjust your search criteria and try again.](#)
[Create a new Patient record.](#)

[Patient Search](#)

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Disclosure Restrictions

Recording a Restriction (4 of 6)

6. Select the [Disclosure Restrictions](#) hyperlink

Thursday, July 8, 2004 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
Jane Doe
01/01/1980
FMP-SSSN:01-
565765768

Summary

A restriction of disclosures exists for this patient.
An alternate address exists for this patient.

Summary
Requests
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Disclosure Restrictions
Authorization
Patient Profile

Summary Item Filters [Display](#)

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☐ Authorizations ☐ Complaints

[Patient Search](#)

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Disclosure Restrictions

Recording a Restriction (5 of 6)

7. Click on the **New** button in the Disclosure Restrictions box

Thursday, July 8, 2004 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
Jane Doe
01/01/1980
FMP-SSSN:01-
565765768

Disclosure Restrictions

Disclosures Restrictions

ID	Type	Start Date	End Date	Outcome	Destination	Details
3	Medical Facility Patient Directories	07/07/2004	07/15/2005	Approved	spouse	restricted from spouse

Summary
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Disclosure Restrictions
Authorization
Patient Profile

[Patient Search](#)

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Disclosure Restrictions

Recording a Restriction (6 of 6)

8. Enter Disclosure Restriction details: (Disclosure type, start and end date, destination, and details)
9. Select **Approved** or **Denied** from the Outcome drop-down box
10. Click on the **Save** button

Thursday, July 8, 2004 Patient Search Logoff

Patient User Admin Requests Requester

Current Patient:
Jane Doe
01/01/1980
FMP-SSSN: 01-565765768

Summary
Requests
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■ Patient Search

Disclosure Restriction

Disclosure Type (the type of disclosure to restrict)
Medical Facility Patient Directories

Start Date (The start date from which US TMA will not share this information with identified party; in MM/DD/YYYY format)
07/08/2004

End Date (The OPTIONAL end date at which time US TMA will begin to share this information again; in MM/DD/YYYY format)
07/07/2005

Restriction Destination (to whom information is being restricted?)
spouse

Details of Restriction (what information is being restricted?)
all medical records

Outcome (Indicate whether request was approved or denied)
Approved

Save

Generating Correspondence (1 of 3)

- Once you have approved or denied the disclosure restriction you have the ability to generate an approval or denial letter
- The letter will be pre-populated with the information that you entered for that particular restriction

Disclosure Restrictions

Generating Correspondence (2 of 3)

- Once you have clicked on the **Save** button, the letters box will appear
- Select the **Title** hyperlink to access the letter

Thursday, July 8, 2004 [Patient Search](#) [Logout](#)

Patient User Admin Requests Requester

Current Patient:
Jane Doe
01/01/1980
FMP-SSSN:01-
565765768

Summary
Requests
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[Patient Search](#)

Disclosure Restriction

Disclosure Type (the type of disclosure to restrict)
Medical Facility Patient Directories

Start Date (The start date from which US TMA will not share this information with identified party; in MM/DD/YYYY format)
07/08/2004

End Date (The OPTIONAL end date at which time US TMA will begin to share this information again; in MM/DD/YYYY format)
07/07/2005

Restriction Destination (to whom information is being restricted?)
spouse

Details of Restriction (what information is being restricted?)
all medical records

Outcome (indicate whether request was approved or denied)
Approved

Letters (Click on the link to view and print the document)

ID	Title
17	Disclosure Restriction - Approval Letter

Generating Correspondence (3 of 3)

- The Approval letter is generated



Disclosure Restrictions

Summary

- You should now be able to:
 - Record a disclosure restriction request
 - Approve or deny the disclosure restriction request
 - Generate an approval or denial letter to be sent to the requester

Authorizations

Authorizations

Objectives

- Upon completion of this lesson, you will be able to:
 - Create an authorization
 - Generate a DD Form 2870
 - Sign an authorization
 - Revoke an authorization

Authorizations

Creating an Authorization (1 of 8)

- The MHS uses the DD Form 2870 (Authorization for Disclosure of Medical or Dental Information)
- Authorizes an individual or organization to disclose a patient's medical or dental information
- DD Form 2870 can be downloaded from the Privacy Office website, or from the DoD Forms website
- Can be generated using PHIMT

Authorizations

Creating an Authorization (2 of 8)

1. Select the **Patient** tab
2. Search for and select the patient

Thursday, July 8, 2004 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
Fred Thomas
05/05/1955

Summary
Requests
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Authorization
Patient Profile

[Patient Search](#)

Patient Search Results

ID	Name	SSN	Birth Date	Address
60	Fred Thomas	111111111	1955-05-05	1234 Deer Ln. Ashburn, VA 22345

Select

Other options:
[Adjust your search criteria and try again.](#)
[Create a new Patient record.](#)

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Authorizations

Creating an Authorization (3 of 8)

1. Select the [Authorization](#) hyperlink

Thursday, July 8, 2004 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
Fred Thomas
05/05/1955

Summary
An alternate address exists for this patient.

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

Summary Item Filters [Display](#)

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☐ Authorizations ☐ Complaints

[Patient Search](#)

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Authorizations

Creating an Authorization (4 of 8)

4. Select the **Authorization Type** from the drop-down box
5. Enter the authorization details: (reason for request, releasing organization, and recipient)

Monday, June 28, 2004 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
Fred Thomas
05/05/1955

Summary
Requests
Record Disclosure
Accounting Suspensions
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Authorization
Patient Profile

[Patient Search](#)

Authorization

Type (the type of authorization to create)
Standard Authorization

Protected Health Information to be Released (the part of the medical record to be released, such as "complete medical record", "pathology report", etc.)
Entire medical record

Reason for Request/Use of Medical Information (a description of each purpose of the requested use or disclosure)

☐ Continued Medical Care
☐ Insurance
☐ Legal
☒ Personal Use
☐ Retirement/Separation
☐ School

Other:
Patient authorizes his brother to have a copy of entire medical record.

Releasing Organization (Organization that released the authorization)
WOODBRIDGE FAMILY HEALTH CENTER

Recipient (the name, complete mailing address, phone and fax of the individual or class of individuals to receive the PHI)
1100 Main Street
Woodbridge, VA 22001

Authorizations

Creating an Authorization (5 of 8)

6. Scroll down the screen and enter: (authorization start and expiration date, treatment type, and treatment start and end date)
7. Place a check in the **Generate Authorization** checkbox
8. Click on the **Save** button

Authorization Start Date (the effective date of the authorization in MM/DD/YYYY format)
06/08/2004

Authorization Expiration (the expiration date of the authorization in MM/DD/YYYY format, an **Action Completed** may be used instead of a date)
06/08/2005

Action Completed (the expiration event for the authorization, such as "Upon completion of the investigation", an **Authorization Expiration** may be used instead of an action if known)

Treatment Type (the type of Treatment)
Outpatient and Inpatient

Treatment Start Date (the treatment or service start date in MM/DD/YYYY format)
03/01/2004

Treatment End Date (the treatment or service end date in MM/DD/YYYY format)

Generate Authorization (generate Authorization for Disclosure form for printing purposes)
☒

Save

Authorizations

Creating an Authorization (6 of 8)

- The Signed Status and Revoked Status boxes on this screen indicate if the DD Form 2870 is signed or revoked

The screenshot displays a web form for creating an authorization. At the top left is a "Save" button. The form is divided into two main sections, each with a header bar and a checkbox:

- Signed Status** (header bar, circled in red):
 - Below the header is a checkbox labeled "Signed" with the text "(checked if the authorization is signed)".
 - Below the checkbox is a "Signed Date" field with the text "(the date that the authorization is signed in MM/DD/YYYY format)". The date "06/30/2004" is entered, and a calendar icon is visible.
 - Below the date field is a "Signed By Person" field with the text "(the individual who signed the authorization)". The name "Fred Thomas" is selected from a dropdown menu.
- Revoked Status** (header bar, circled in red):
 - Below the header is a checkbox labeled "Revoked" with the text "(checked if the authorization is revoked)".
 - Below the checkbox is a "Revoked Date" field with the text "(the date that the authorization was revoked in MM/DD/YYYY format)". The date "06/30/2004" is entered, and a calendar icon is visible.
 - Below the date field is a "Revoked By Person" field with the text "(the individual who revoked the authorization)". The name "Fred Thomas" is selected from a dropdown menu.

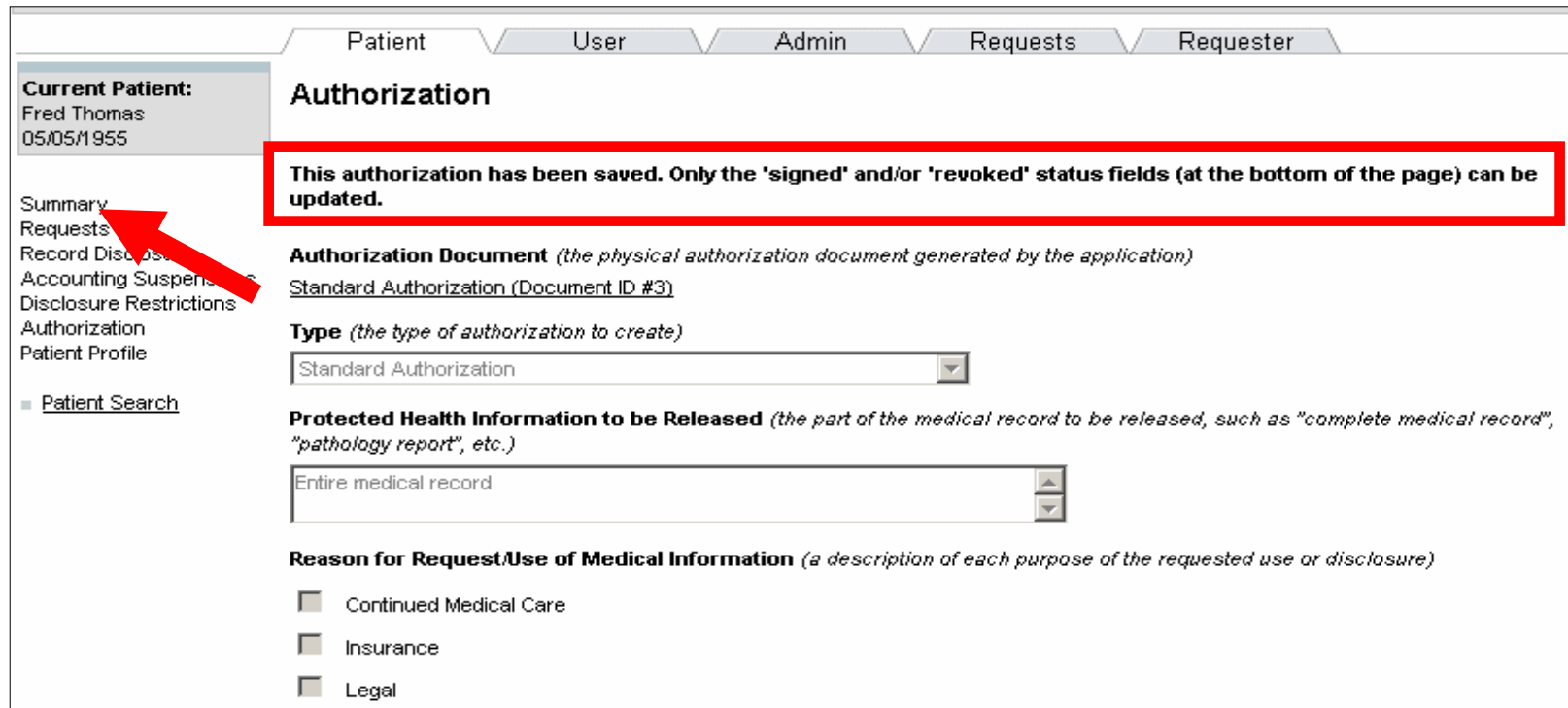
At the bottom of the form is another "Save" button.

Authorizations

Creating an Authorization (7 of 8)

- A note appears at the top of the screen indicating the authorization is saved and that only the “Signed” or “Revoked” status fields may be changed at this point

9. Select the [Summary](#) hyperlink



Patient User Admin Requests Requester

Current Patient:
Fred Thomas
05/05/1955

Authorization

This authorization has been saved. Only the 'signed' and/or 'revoked' status fields (at the bottom of the page) can be updated.

Summary
Requests
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Authorization Document *(the physical authorization document generated by the application)*
Standard Authorization (Document ID #3)

Type *(the type of authorization to create)*
Standard Authorization

Protected Health Information to be Released *(the part of the medical record to be released, such as "complete medical record", "pathology report", etc.)*
Entire medical record

Reason for Request/Use of Medical Information *(a description of each purpose of the requested use or disclosure)*

☐ Continued Medical Care
☐ Insurance
☐ Legal

Authorizations

Creating an Authorization (8 of 8)

10. Place a check in the **Authorizations** checkbox

11. Click on the **Display** button

Wednesday, June 30, 2004 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
Fred Thomas
05/05/1955

Summary
An alternate address exists for this patient.

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

[Patient Search](#)

Summary Item Filters

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☒ **Authorizations** ☐ Complaints

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Authorizations

Generate DD Form 2870 (1 of 2)

- The new authorization will appear on the Summary screen
12. Select the [authorization title](#) hyperlink to generate DD Form 2870

Wednesday, June 30, 2004 [Patient Search](#) [Logout](#)

Patient User Admin Requests Requester

Current Patient:
Fred Thomas
05/05/1955

Summary
An alternate address exists for this patient.

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
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[Patient Search](#)

Summary Item Filters [Display](#)

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☒ Authorizations ☐ Complaints

Authorizations (Revoked authorizations are highlighted in red)

ID	Title	Description	Signed	Expiration	Revoked
	Standard Authorization	For disclosures of 'Entire medical record' to '1100 Main Street Woodbridge, VA 22000'		06/08/2005	

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Authorizations

Generate DD Form 2870 (2 of 2)

- DD Form 2870 in Adobe Acrobat format
13. You may print the form and request the patient's signature

Bookmarks
Thumbnails
Signatures

AUTHORIZATION FOR DISCLOSURE OF MEDICAL OR DENTAL INFORMATION		
The purpose of this form is to provide the MTF/DTF/TRICARE Health Plan with a means to request the use and/or disclosure of an individual's protected health information. Guidelines regarding use of this form are contained in DOD Regulation 6025.18-R.		
This form will not be used for authorization to disclose alcohol or drug abuse patient information from medical records or for authorization to disclose information from records of an alcohol or drug abuse treatment program. In addition, any use as an authorization to use or disclose psychotherapy notes may not be combined with another authorization except one to use or disclose psychotherapy notes. Privacy Act of 1974 applies		
PATIENT DATA		
Name (Last, First, MI) Thomas, Fred	Date of Birth 05-05-1955	Patient SSN 111111111
Period of Treatment 03-01-2004- 03-01-2004	Type of Treatment: Outpatient and Inpatient	
DISCLOSURE		
I authorize <u>WOODBIDGE FAMILY HEALTH CENTER</u> (Name of MTF/DTF) to release my patient information to recipient: <u>1100 Main Street</u> <u>Woodbridge, VA 22000</u>		Reason for Request/Use of Medical Information: Personal Use, Patient authorizes his brother to have a copy of entire medical record.
Information to be Released: Entire medical record		

1 of 1 8.5 x 11 in

Signing an Authorization (1 of 5)

- Once an authorization has been entered, it needs to be signed by the patient for validation
- After the authorization is signed by the patient, a user has the ability to document the signature within the PHIMT

Authorizations

Signing an Authorization (2 of 5)

1. Select the authorization **ID** hyperlink to return to the detailed authorization record

Thursday, July 1, 2004 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
Fred Thomas
05/05/1955

Summary
An alternate address exists for this patient.

Summary Item Filters [Display](#)
☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☒ Authorizations ☐ Complaints

Authorizations (Revoked authorizations are highlighted in red)

ID	Title	Description	Signed	Expiration	Revoked
3	Standard Authorization	For disclosures of 'Entire medical record' to '1100 Main Street Woodbridge, VA 22000'		06/08/2005	

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Authorizations

Signing an Authorization (3 of 5)

2. Scroll to the bottom of the page to the Signed Status box
3. Place a check in the Signed Status checkbox
4. Select the date and the authorizing person's identity from the drop-down box
5. Click on the **Update** button

The screenshot shows a web form with two main sections: "Signed Status" and "Revoked Status". The "Signed Status" section is highlighted with a red rectangular box. It contains a checkbox labeled "Signed" (checked if the authorization is signed) which is checked. Below it is a "Signed Date" field (the date that the authorization is signed in MM/DD/YYYY format) with a text input showing "06/08/2004" and a calendar icon. Below that is a "Signed By Person" field (the individual who signed the authorization) with a dropdown menu showing "Fred Thomas". The "Revoked Status" section is below it and contains a "Revoked" checkbox (checked if the authorization is revoked) which is unchecked. It also has "Revoked Date" and "Revoked By Person" fields, both with the same values as the signed section. At the bottom of the form is an "Update" button, which is highlighted with a red arrow pointing to it from the right.

Signed Status

Signed (checked if the authorization is signed)

☒

Signed Date (the date that the authorization is signed in MM/DD/YYYY format)

06/08/2004

Signed By Person (the individual who signed the authorization)

Fred Thomas

Revoked Status

Revoked (checked if the authorization is revoked)

☐

Revoked Date (the date that the authorization was revoked in MM/DD/YYYY format)

06/08/2004

Revoked By Person (the individual who revoked the authorization)

Fred Thomas

Update

Authorizations

Signing an Authorization (4 of 5)

6. Select the [Summary](#) hyperlink
7. Place a check in the Authorizations checkbox
8. Click on the [Display](#) button

Thursday, July 1, 2004 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
Fred Thomas
05/05/1955

Summary
An alternate address exists for this patient.

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

[Patient Search](#)

Summary Item Filters [Display](#)

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☒ Authorizations ☐ Complaints

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Authorizations

Signing an Authorization (5 of 5)

- You will now see that the authorization indicates that it has been signed

Thursday, July 1, 2004 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
Fred Thomas
05/05/1955

Summary
An alternate address exists for this patient.

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

[Patient Search](#)

Summary Item Filters [Display](#)

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☒ Authorizations ☐ Complaints

Authorizations (Revoked authorizations are highlighted in red)

ID	Title	Description	Signed	Expiration	Revoked
3	Standard Authorization	For disclosures of 'Entire medical record' to '1100 Main Street Woodbridge, VA 22000'	06/08/2004	06/08/2005	

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Revoking an Authorization (1 of 5)

- DoD 6025.18-R, Section C5.2.5
- Privacy Specialists can revoke an authorization when instructed by a patient in writing
 - Except if:
 - The covered entity has taken action in reliance thereon
 - Insurance coverage

Revoking an Authorization (2 of 5)

1. Select the authorization ID hyperlink

Thursday, July 1, 2004 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
Fred Thomas
05/05/1955

Summary
An alternate address exists for this patient.

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

[Patient Search](#)

Summary Item Filters [Display](#)

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☒ Authorizations ☐ Complaints

Authorizations (Revoked authorizations are highlighted in red)

ID	Title	Description	Signed	Expiration	Revoked
3	Standard Authorization	For disclosures of 'Entire medical record' to '1100 Main Street Woodbridge, VA 22000'	06/08/2004	06/08/2005	

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Authorizations

Revoking an Authorization (3 of 5)

2. Scroll to the bottom of the screen to the Revoked Status box
3. Place a check in the Revoked check box
4. Select the date and the revoking person's identity in the drop-down box
5. Click on the **Update** button

Signed Status
Signed (checked if the authorization is signed)
☒
Signed Date (the date that the authorization is signed in MM/DD/YYYY format)
06/08/2004
Signed By Person (the individual who signed the authorization)
Fred Thomas

Revoked Status
Revoked (checked if the authorization is revoked)
☒
Revoked Date (the date that the authorization was revoked in MM/DD/YYYY format)
06/08/2004
Revoked By Person (the individual who revoked the authorization)
Fred Thomas

Update

Revoking an Authorization (4 of 5)

6. Select the [Summary](#) hyperlink to view the authorization
7. Place a check in the Authorizations checkbox
8. Click on the [Display](#) button

Thursday, July 1, 2004 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
Fred Thomas
05/05/1955

Summary
An alternate address exists for this patient.

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

[Patient Search](#)

Summary Item Filters [Display](#)

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☒ **Authorizations** ☐ Complaints

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Version: 2.2

Authorizations

Revoking an Authorization (5 of 5)

- The revoked authorization is highlighted in red

Thursday, July 1, 2004 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

Current Patient:
Fred Thomas
05/05/1955

Summary
An alternate address exists for this patient.

Summary
Requests
Record Disclosure
Accounting Suspensions
Disclosure Restrictions
Authorization
Patient Profile

☐ Patient Search

Summary Item Filters

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☒ Authorizations ☐ Complaints

Authorizations (Revoked authorizations are highlighted in red)

ID	Title	Description	Signed	Expiration	Revoked
3	Standard Authorization	For disclosures of 'Entire medical record' to '1100 Main Street Woodbridge, VA 22000'	06/08/2004	06/08/2005	06/08/2004

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Version: 2.2

Authorizations

Summary

- You should now be able to:
 - Create an authorization
 - Generate a DD Form 2870
 - Sign an authorization
 - Revoke an authorization

Administrative Summary

Administrative Summary

Objectives

- Upon completion of this lesson, you will be able to:
 - View administrative summary reports

Administrative Summary Reports

- Administrative summaries provide a visual representation by organization of:
 - Disclosures over a 12 month period
 - All requests by type
 - All requests over a 12 month period
 - Top recipients of disclosures
 - Top requesters for all requests
- Performed by Privacy Specialists and User Admins

Creating Administrative Summary Reports (1 of 3)

1. Select the [Admin](#) Tab
2. Select the [Administrative Summary](#) hyperlink

Thursday, July 8, 2004 [Patient Search](#) [Logoff](#)

[Patient](#) [User](#) **[Admin](#)** [Requests](#) [Requester](#)

Current Admin:
Ditscap Test
US TMA

Administrative Summary
Organizations
Queue Users
Disclosure Imports
Disclosure Imports History

Origin Organizations

ID	Name	Parent Name	Address	Contact Person	Contact Phone
481	MED GROUP-USAF ACADEMY CO	US Air Force	4102 Pinion Drive Ste 4000 USAF Academy, CO 80840		
3757	10th Med GROUP- PETERSON AFB	HQ AIR FORCE SPACE COMMAND			
442	11TH MED GRP-BOLLING	HQ Air Force (Direct reporting unit)	238 Brookley Avenue RM 125 Bolling AFB, DC 20032		
3719	11th Wing	US Air Force	11 MDG/SGHQ 238 238 Brookley Ave Bolling AFB, DC 20032		
308	121ST GEN HOSP SEOUL	18th MEDCOM - KOREA	Unit # 15244 APO AP , 96205		

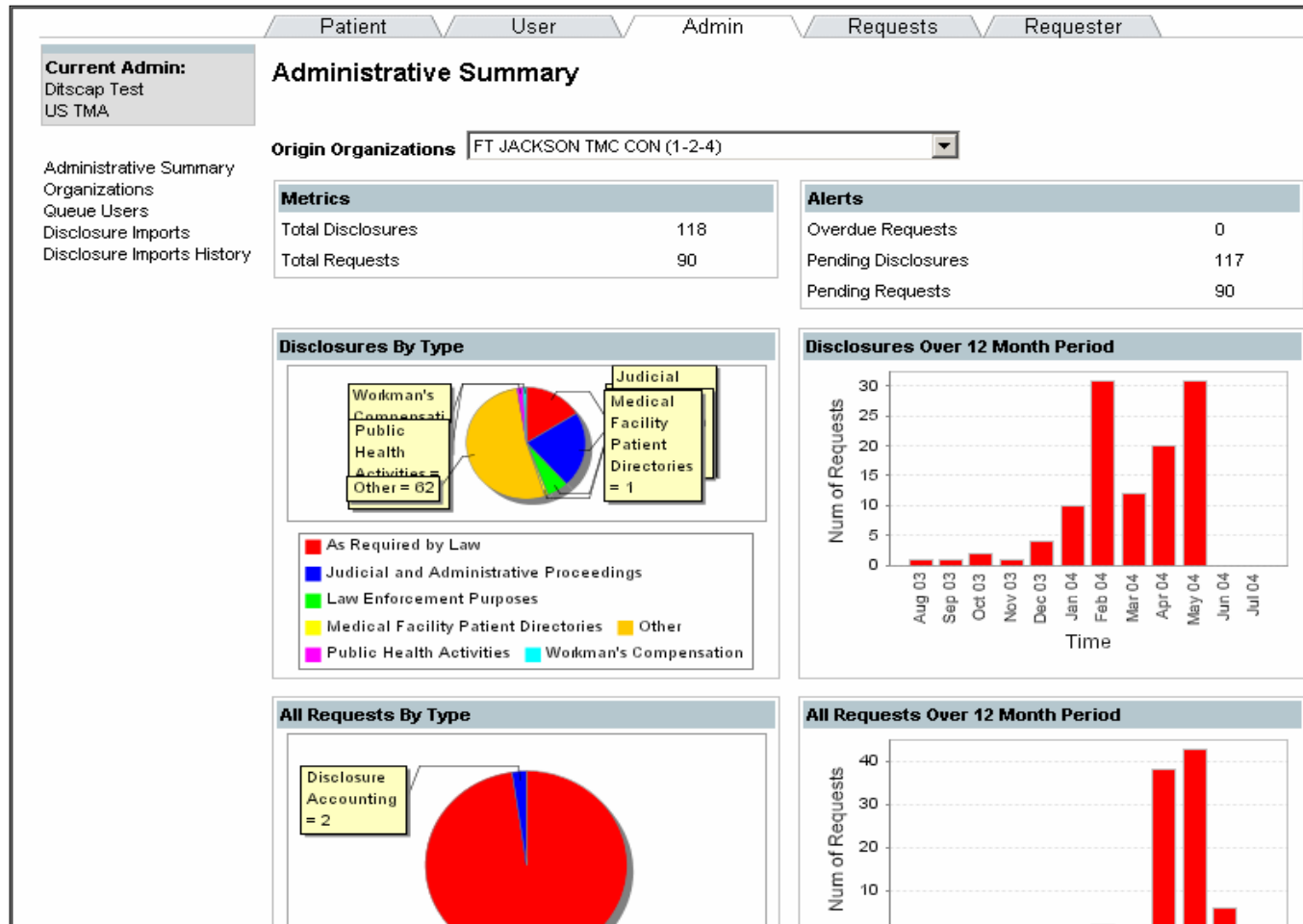
Creating Administrative Summary Reports (2 of 3)

3. Select your Organization from the drop-down box

The screenshot displays the 'Administrative Summary' web application interface. At the top, a status bar shows the date 'Thursday, July 8, 2004' and links for 'Patient Search' and 'Logoff'. Below this is a navigation bar with tabs for 'Patient', 'User', 'Admin', 'Requests', and 'Requester'. On the left side, a sidebar identifies the 'Current Admin' as 'Ditscap Test' and 'US TMA', and lists a menu of options: 'Administrative Summary', 'Organizations', 'Queue Users', 'Disclosure Imports', and 'Disclosure Imports History'. The main content area is titled 'Administrative Summary' and features a section labeled 'Origin Organizations' with a drop-down menu. The menu is currently open, showing a list of organizations including 'All', '10th MED GROUP-USAF ACADEMY CO', '10th Med GROUP- PETERSON AFB', '11TH MED GRP-BOLLING', '11th Wing', '121ST GEN HOSP SEOUL', '12th MED GRP-RANDOLPH', '14th MED GRP-COLUMBUS', '15th MED GRP-HICKAM', and '16th MED GRP-HURLBURT FIELD'. A red arrow points to the top of the drop-down list. The text 'HTS RESERVED' is visible on the right side of the interface.

Creating Administrative Summary Reports (3 of 3)

- The Administrative Summary reports will display



Administrative Summary

Summary

- You should now be able to:
 - View administrative summary reports

Presentation Summary

- You should now be able to:
 - Describe the PHIMT application
 - Identify the user roles and permissions
 - Perform the functions of the User Admin, Privacy Specialist, and Regular User within the PHIMT

Resources

- DoD 6025.18-R, “DoD Health Information Privacy Regulation”, January 2003
- www.tricare.osd.mil/tmaprivacy/HIPAA.cfm
- privacymail@tma.osd.mil for subject matter questions
- hipaasupport@tma.osd.mil for tool related questions
- Service HIPAA Privacy representatives



HEALTH AFFAIRS



Please fill out your critique

Thanks!

